



REQUEST FOR PROPOSAL

RFP NUMBER : SHRA/RFP/PDF/07/202223

CLOSING DATE : Monday, 12th December 2022

TIME : 16h00

DESCRIPTION : The appointment of a service provider to develop a subsidy variation model specifically for application in medium-density multi-storey social housing projects and cost benchmark exercise

BRIEFING: Yes No

DOCUMENTS IN THIS BID DOCUMENT PACK

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

SECTION A

1. Background
2. RFP 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. Submission Checklist

1. SECTION A

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

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

1.2 VISION:

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

1.3 FUNCTIONS

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

2. RFB SUBMISSION CONDITIONS AND INSTRUCTIONS

2.1 FRAUD AND CORRUPTION

2.1.1 All 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 Ms Thinadzanga Nevari at nevarit@shra.org.za by **8th December 2022 at 16h00**. The bid **number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.** If appropriate, the clarifying information will be made available to all bidders by e-mail only.

2.4 SUBMITTING BIDS

2.4.1 The proposal should be emailed to:

Ms Thinadzanga Nevari
Email address: nevarit@shra.org.za

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

- RFB number: SHRA/RFP/PDF/07/202223
- Closing date and time: Monday 12th December 2022 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 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 (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.

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: 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 6: General Conditions of Contract

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

Part 7: Technical approach

Bidder must at least:

Describe, in detail, exactly how they propose to carry out the activities to achieve the outcomes identified in the terms of reference. Bidders are required to have the basic office equipment and the resource/s (which must include, laptop, 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 7 should be no longer than 10 single-sided A4 pages in Arial 11 (font size).

Part 8: Team Details

The bidder must provide:

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

Part 9: Experience in this field

It is essential the service provider displays:

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

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

2.7 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 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

TABLE OF ABBREVIATIONS AND ACRONYMS USED

Abbreviation / acronym	Explanation
BIM	Building Information Modelling
BNG	Breaking New Ground
CAPEX	Capital Expenditure
CCG	Consolidated Capital Grant (social housing grant funding)
CSIR	Council for Scientific and Industrial Research
GCA	Gross Construction Area (total enclosed building area under roof on all levels)
HSDG	Housing Settlements Development Grant
IHS	Institutional Housing Subsidy
MEC	Member of Executive Council
NBR	National Building Regulations
NEMA	National Environmental Management Act 107 of 1998
NHBRC	National Home builders Registration Council
ODA	Other delivery agent (Private developers, not accredited as SHIs, delivering social housing)
OHSA	Occupational Health and Safety Act 85 of 1993
QSC	Quick Scan C (SHRA's financial modelling and viability tool used for evaluating project funding submissions)
RCG	Restructuring Capital Grant
RZ	Designated and gazetted social housing Restructuring Zone
SANS	South African National Standards
SCCCA	Southern Cape Coastal Condensation Area
SHI	Social Housing Institution (SHRA Accredited not for profit social housing provider and manager)
SHRA	Social Housing Regulatory Authority
SPLUMA	Spatial Planning and land Use management Act 16 of 2013
TDC	Total Development Cost (also known as Total Capital Outlay or TCO)
USDG	Urban Settlements Development Grant

3.1 SUMMARY OF THE ASSIGNMENT

SHRA seeks to appoint a service provider to develop a Subsidy Variation Manual and Calculator specifically for application in medium-density multi-storey social housing projects.

The Social Housing Variation Manual is intended to give a guidance to provide a basis for decision making for the “Adjustment of the Social Housing Consolidated Capital Grant Amount for Extraordinary Development Conditions”

The Manual and Calculator must provide for:

- Designation of extraordinary development conditions applicable to both greenfields newbuild and brownfields re-development medium-density multi-storey social housing projects
- Prescripts and guidelines for verification by competent persons and/or certifying bodies
- Description of precautionary measures to be taken
- Calculation of the extra amounts of subsidy needed to cover the cost of precautionary measures

Extraordinary development conditions designated typically relate to:

- Climatic (rain penetration, condensation, etc.)
- Topographic (natural ground slope of the site)
- Geotechnical (inherent site geology)
- Housing for people with physical disabilities and special housing needs

3.2 REQUIRED SKILL AND EXPERIENCE

Completing the assignment will require a multi-disciplinary skill-set that would include:

- Geotechnical engineering
- Structural engineering
- Quantity surveying
- Civil engineering
- Construction cost estimating and modelling

The deliverables will include the following documents, developed with these Terms of Reference as the basis and in the same style and format as the existing Subsidy Variation Manual in the National Housing Code, and accompanying Calculator of the National Department of Human Settlements, but customized as necessary for application to Social Housing projects:

- A fully developed, formatted and editable Variation Manual in Microsoft Word
- A working calculator in Microsoft Excel, with input sheet for variables, throughput or workings sheets, output sheet with automated calculated

results, and populated with all the updated and updateable construction cost rates needed

Note: that there is no actual design work involved, but for cost estimating purposes, concept descriptions and parameters for “typical” low-rise (two to four-storey), medium-rise and high-rise (eight to twelve-storey) social housing projects would have to be developed.

The service provider will work closely with, and under guidance of designated the SHRA staff and other appointed persons to assist with the implementation of the assignment.

3.3 PROBLEM STATEMENT

The SHRA has recently been funding Geo-Technical variations through its allocation of the CCG. Previously this was done through provincial allocations.

Calculation of variation amounts has been based on the Variation Manual in the National Housing Code (2009) and the Variation Calculator (2012). When determining the amount of variation there has been ambiguity in its quantum and its applicability when it comes to Social Housing in terms of the designation of the conditions, verification, calculation and source of funding. The Variation Manual, in its present form provides only for standalone (BNG) houses, not for multi-storey residential apartment units which is the typical typology for Social Housing. This problem is further compounded by the fact that each social housing project is unique with regard to site characteristics, development density, building and unit typologies, massing and layout configurations, unit size and mix and more.

The problem statement identified that the issue with how Geotech variances is applied stems from two sources namely:

- 1) Following the consolidation of the Institutional Housing Subsidy (IHS) with the social housing Restructuring Capital Grant (RCG) and moving the funding allocation to the Consolidated Capital Grant (CCG) provinces no longer budget for Social Housing nor associated variations.
- 2) The basis of variation determination is based on several geophysical and other elements that are applicable to standalone BNG houses and not medium-high density buildings.

In addition, the calculations apply only to the Institutional Housing Subsidy component of the grant and therefore, bares no relation to real cost and its impact on the total CCG. To address the matter the variation manual and calculator requires revision.

3.4 SCOPE OF WORK REQUIRED

In order to provide solutions to the identified problem statement the appointment of a technically skilled and inclined provider to undertake the following as part of the assignment:

- Undertake research to and understanding of the regulatory and associated funding of comparable developments
- Develop overarching principles and parameters to be applied for Social Housing developments (medium density low to medium-high rise) rentals
- Develop a Variation Manual and Calculator considering the principles and various parameters agreed upon as part of the project inception.

3.5 BACKGROUND

3.5.1 Policy context

Paraphrased from the National Housing Code (2009): Volume 2, Part 3: “Technical and General Guidelines”, Chapter 3 “Variation Manual – Adjustment of the Housing Subsidy Scheme Amount for Extraordinary Development Conditions”:

Housing Policy generally emphasises the provision of durable, quality housing that will have an investment value (*for the beneficiary*). To ensure the achievement of this objective in all circumstances, the adjustment of the subsidy amount will be allowed to finance only the required precautionary measures to cater for extraordinary development conditions.

This adjustment will be based on the geo-technical, topographical, and other and additional conditions of the development area as identified, and the special housing needs of certain categories of disabled beneficiaries or beneficiaries with disabled dependents, and enhancement to their houses to afford them the opportunity of independent living.

With regard to the geotechnical and topographical dimension, the policy provides for professional investigation and qualification of the extraordinary development conditions. It also requires professional designs and specifications, including costing of the required precautionary measures to ensure durable, quality housing provision through the programme.

The purpose of the manual is to provide a basis for decision-making regarding the adjustment of the subsidy amount. The manual addresses all the extraordinary development conditions that may require special precautionary measures. The manual therefore provides an early warning system together with guidelines for the adjustment of the subsidy amount once conditions and the required precautionary measures are confirmed.

Since the Housing Subsidy Scheme provides housing for the poor, certain proposed development sites, or specific areas within a development site, may not be economically viable for housing for the poor. In these circumstances a threshold of 20% adjustment of the subsidy amount on a development site and 30% adjustment of the subsidy amount on a specific erf, excluding adjustment for the Southern Cape Coastal Condensation Area, location of the Development Site and provision for the disabled, will be applicable.

Any housing subsidy project application that includes an application for an adjustment of the subsidy amount due to extraordinary development conditions will require quantitative verification in the form of a comprehensive report by an appropriately qualified professional expert to the specifications of the NHBRC and the MEC.

The standard housing development registration procedure involves the indication of the precise location of the proposed development in the form of co-ordinates in Latitude and Longitude (WGS 84 system). This information, combined with the national geological maps, provide an immediate indication of the possible geo-technical and topographical conditions that may be applicable at a specific area or site.

3.5.2 Review of regulatory framework governing physical land development and its relevance to subsidy variation

Legislation pertaining to physical development generally deals with:

- Protection of the environment i.e. mitigating the impact of physical development of land on the natural, cultural and social environment.
- Ensuring health and safety of the public (occupants and users of buildings and facilities) by providing design guidelines and building standards.

In pursuance of the above there are prescriptions in several the pieces of legislation that requires from developers to carry out site investigations in order to identify, verify and quantify risks and develop recommendations and guidelines for mitigating those risks. It is envisaged that the assignment will cover a review of at least the following:

- The Constitution
- National Environmental Management Act (NEMA)
- Spatial Planning and Land Use Management Act (SPLUMA) and relevant related planning legislation
- Application of the National Building Regulations (NBR) and relevant related South African National Standards (SANS)
- Consumer Protection Act and National Home Builders Registration Council (NHBRC) Technical Requirements and Home Building Manual
- Occupational Health and Safety Act (OHSA) And Construction Regulations
- National Housing Code 2009 and subsequent developments in the Subsidy System

- Social Housing Act and Regulations

The assignment will include a review of all pertinent policies, legislation and regulations governing physical land development for social housing. For purposes of preliminary identification of extraordinary development conditions, the following brief notes are made:

The National Building Regulations (NBR) and accompanying South African National Standards (SANS) require that measures be taken in the design and construction of buildings, including site investigations to be undertaken to ensure the health and safety of occupants and the public under all conditions.

The National Home Builders Registration Council (NHBRC) requires enrolment of all housing projects with its Warranty Scheme, and site investigations to be undertaken to identify and take measures to deal with certain climatic (SCCCA) and geotechnical issues such as dolomite, clayey soils, compressible and collapsible soils, mining induced and natural seismic activity and contaminated sites. The NHBRC's Technical Requirements and Simplified Home Building Manual and Guide (2nd Edition, 2015) developed in consultation with the Council for Geoscience and based on the NBR and SANS contain requirements for undertaking geotechnical site investigations and performance descriptions and parameters for residential construction.

National Norms and Standards for the Remediation of Contaminated land and Soils Quality have been published under our environmental legislation (NEMA).

The Spatial Planning and Land Use Management Act (SPLUMA) and related legislation contain extensive guidelines and prescripts with regarding the developability of land relating for instance to flood lines.

The SHRA being a schedule 3A public entity, would also need to consider the Public Finance Management Act (PFMA) and applicable National Treasury instruction note (May 2011) which gives guidance Management of expansions or variation of orders against original contracts.

In the light of the above an initial scoping of legislation and regulations that govern physical land development, relevant literature and case studies suggests consideration and discussion of at least the categories and issues set out below:

3.5.3 Overview of the current Variation Manual and Calculator

Volume 2, Part 3 of the National Housing Code 2009 "Technical and General Guidelines", Chapter 3 "Variation Manual – Adjustment of the Housing Subsidy Scheme Amount for Extraordinary Development Conditions" (and accompanying Variation Calculator 2012 version) provide for adjustment of state housing subsidies to address "conditions

that require intensive precautionary measures to ensure a durable product with investment value”.

A question may then arise whether it is necessary to develop a new instrument specifically designed for social housing or whether the existing one could merely have a section for social housing added on. It must be borne in mind that the Manual and Calculator were designed to cater for standalone BNG dwellings, and the conditions, precautionary measures and amounts provided would not apply directly to medium-density multi-storey building typologies.

The existing Manual and Calculator provides for:

- Designation of extraordinary development conditions
- Prescripts and guidelines for verification by competent persons or certifying bodies
- Description of precautionary measures to be taken
- Calculation of the extra amounts of subsidy needed to cover the cost of precautionary measures

Extraordinary development conditions designated in the Manual relate to:

- Climatic (problems caused by rain penetration and condensation in the designated Southern Cape Coastal Condensation Area (SCCCA))
- Topographic (natural ground slope of the site)
- Geotechnical (inherent site geology)
- Housing for people with physical disabilities and special housing needs
- Location of Development Site (distance from nearest urban centres and building supplies)

Following a 2013 review of subsidy housing typologies and the subsidy quantum, the Department introduced on 1 April 2014 “Enhancements to the National Norms and Standards for the Construction of Standalone Residential Dwellings and Engineering Services and Adjustment of the Housing Subsidy Quantum”

The enhanced norms were adopted in response mainly to the requirements of the 2011 revised energy efficiency National Building Regulations SANS 10400-XA which addressed in part the issues relating to the SCCCA, and to introduce a new typology and quantum designed specifically for certain aspects of disability and housing for Military Veterans.

On 1 April 2018 the Department also Introduced subsidies for “New Higher Density Housing Typologies” namely double-storey and three-storey walk-up BNG housing.

None of the above developments in any way were intended to address the need for variation in the grant amount for medium-density multi-storey social housing typologies nor did they bring the existing instrument any closer to being suitable for application in social housing projects.

It is proposed therefore, that although the existing instrument is useful for informing about many of the issues that need consideration it would not be practical and may lead to confusion if clauses or sections are simply added to cater for social housing, and that there is clear need for a bespoke variation model for social housing building typologies.

3.5.4 DEVELOPING A SOCIAL HOUSING-SPECIFIC VARIATION MANUAL AND CALCULATOR

3.5.4.1 Definitions

The following terms and expressions shall have the meanings assigned to them hereunder:

Precautionary Measures - *the preventative measures required to ensure a durable product with investment value.*

Extraordinary Development Conditions - *conditions that require intensive precautionary measures to ensure a durable product with investment value.*

Adjustment of Consolidated Capital Grant Amount - *the quantum with which the grant amount must be increased to ensure a durable product with investment value.*

Geotechnical Conditions - *geologically related conditions (soil, groundwater, etc.) that can influence the quality of the social housing product if precautionary measures are not implemented.*

Topographical Conditions - *the natural ground slope of the site that can influence the quality of the social housing product if precautionary measures are not implemented.*

Physical Disability - *degrees of disability that require special additions or alterations to the social housing product.*

3.5.4.2 General approach and principles for developing a social housing-specific Variation Manual and Calculator

As with existing Manual and calculator, the new instruments should deal with:

- Clear and comprehensive designation of extraordinary development conditions applicable to medium-density development
- Prescripts and guidelines for verification by competent persons or certifying bodies
- Description of precautionary measures to be taken
- Calculation of the extra amounts of subsidy needed to cover the cost of precautionary measures

Verification is critical – clear and comprehensive criteria for application by competent persons/certifying bodies, guided by legislation and recognised technical norms and standards (e.g NBR, SANS, Agrément, NHBC, Housing Code, Council for Geosciences, etc.)

For verification prescripts it is not expected of the appointed service provider to research and develop references to actual codes, norms, and standards applicable to each possible extra-ordinary development condition as described here-in. The manual must make it clear though that applicants for the Subsidy Variation must provide verification (justification and motivation) by a competent person as defined above for each condition identified and variation applied for with their submissions.

3.5.4.3 Preliminary identification of extraordinary development conditions potentially applicable to social housing development (indicative guidelines only)

3.5.4.4 For Greenfields low-rise walk-ups - Sites subject to or affected for instance by:

- Severe climatic or atmospheric conditions as defined in the Southern Cape Coastal Condensation Area, but taking cognisance of measures already catered for in the current Institutional Subsidy component of the CCG;
- Geohydrology: High ground water tables and see page;
- Sub-soil (Geotech) conditions that can cause movement/subsidence in the near surface horizon e.g.:
 - High erodibility of soil (wind and/or water erosion);
 - Soft/heaving clay;
 - Transported soils (collapsible/compressible soils, oversite deep fill and refuse, etc.);
 - Dolomite;
 - Sites extensively used as dump sites in the past and overlain with refuse
 - Natural seismic induced activity;
 - Mining induced activity;
- Contamination - past pollution of the soil or ground water;
- Topography - extremely steep slopes;
- Topography – extremely flat slopes;
- Sites in flood plains next to watercourses (natural and/or man-made);
- Mole infestation;
- Requirement for providing units catering for people with disabilities and special housing needs
- Environmental considerations (e.g., indigenous vegetation)
- Previously contaminated sites that may including radioactive factors

The service provider is required to have the technical expertise to ascertain and recommend any appropriate classes and any other

conditions which may be applicable for this exercise but not explicitly cited in these terms of reference.

3.5.4.5 Examples of possible effects and guidelines for precautionary measures for the conditions summarized above (indicative guidelines only):

CLIMATIC CONDITIONS		
Site subject to/affected by:	Possible effects:	Examples of precautionary mitigating measures:
Severe climatic or atmospheric conditions as defined in the Southern Cape Coastal Condensation Area (SCCCA)	<ul style="list-style-type: none"> • Rain penetration through walls and any other porous external surfaces • Damp walls and ceilings • Mould (fungal) growth on surfaces • High humidity in units • Health issues 	<ul style="list-style-type: none"> • External plaster and paint on walls (no extra funding– should be part of normal design practice) • Cavity walls with bitumen coating of inner skin, but taking cognisance of measures already catered for in the current Institutional Subsidy component of the CCG such as insulated ceilings and internal plaster on walls

GEOTECHNICAL CONDITIONS (INHERENT SITE GEOLOGY):		
Site subject to/affected by:	Possible effects:	Examples of precautionary mitigating measures:
Groundwater - high water tables and seepage along drainage paths (artesian wells)	<ul style="list-style-type: none"> • Waterlogged grounds, • damp walls and floors, • ponding and flooding, • health issues, etc. 	<ul style="list-style-type: none"> • Subsurface drainage fields and/or interceptor drains to cut off seepage along drainage paths and prevent ground water rising to the surface • Open swales (Grassed swales are shallow, open, graded channels primarily designed for conveying water in a longitudinal manner through a drainage pathway) • Improved damp proofing to buildings • Tanking and permanent dewatering (pumping) of parking basements where applicable • Dewatering of foundations and service trenches during construction
Erodibility of the soil (wind and/or water erosion)	Removal of foundation support by rain and/or wind action.	<ul style="list-style-type: none"> • Wide aprons with deep edge beams around buildings • Provision of retaining walls • Good compaction of earth surfaces around buildings, including stabilisation • Earthworks to reduce slopes • Lined surface drainage and pitching of

		<p>slopes</p> <ul style="list-style-type: none"> Erection and dismantling of temporary wind barriers during construction, and wide concrete aprons around buildings
Hard excavation	Extra cost to bulk earthworks, foundations and services trenches in hard material	Mechanical excavation, blasting, wedging and splitting, etc.
Site Class Designations indicating likelihood of movement/subsidence in near surface horizons caused by Heaving clays	<ul style="list-style-type: none"> Differential settlement, hogging, doming, etc. causing cracking of structures, damage to joints of services pipes, etc. 	<ul style="list-style-type: none"> Replacement and/or stabilization of unsuitable material Foundation and services design, building procedures and precautionary measures in accordance with appropriate guidelines and standards including for instance stiffened strip footings, rafts and/or piling
Site Class Designations indicating likelihood of movement/subsidence in near surface horizons caused by transported materials including fills, compressible and collapsible soils	<ul style="list-style-type: none"> Differential settlement, causing cracking of structures, damage to joints of services pipes, etc. 	<ul style="list-style-type: none"> Replacement and/or stabilization of unsuitable material Re-working of existing fills where applicable after removal of foreign and organic materials Foundation and services design, building procedures and precautionary measures in accordance with appropriate guidelines and standards including for instance modified strip footings, rafts, and/or piling
Dolomite Area Designations in areas underlain by dolomite land	Subsidence associated with sinkhole formation	Foundation and services design, building procedures and precautionary measures in accordance with appropriate guidelines and standards
Areas subject to mining induced activity (e.g. shallow undermining)	Subsidence	<ul style="list-style-type: none"> Foundation and services design, building procedures and precautionary measures in accordance with appropriate guidelines and standards Additional earthworks to fill open outcrop; Soil mattresses
Areas subject to natural seismic activity	Vibration damage to structures	Foundation, structural and services design, building procedures and precautionary measures in accordance with appropriate guidelines and standards for instance stiffened shear walls and movement joints
Sites extensively used as dump sites	<ul style="list-style-type: none"> Health issues 	Removal of unsuitable material

in the past and heavily overlain with refuse and other deleterious material	<ul style="list-style-type: none"> Foundation movement and subsidence 	
Sites contaminated from past pollution of the soil and ground water	<ul style="list-style-type: none"> Health issues Regulatory breach 	Decontamination/remediation/extensive rehabilitation in accordance with applicable regulations and accepted practice
Sites in areas with mole infestation	Undermining of natural ground/fill under floors, parking areas and roads	Inserting mole barriers in the soil

TOPOGRAPHICAL CONDITIONS (NATURAL GROUND SLOPE OF THE SITE):		
Extra costs involved in building on sites with extremely steep slopes:		
Site subject to/affected by:	Possible effects:	Examples of precautionary mitigating measures:
Steep slopes	<ul style="list-style-type: none"> High cost of foundations, unstable slopes prone to erosion and/or slippage under load, large portions of site unusable for parking, gardens and common open space 	<ul style="list-style-type: none"> Bulk earthworks (cut to fill, cut to spoil, imported fill and layer works) to create level platforms for buildings and parking areas. Retaining structures, pitching of sloping surfaces, etc. Additional lined channels and retaining structures for stability of terraced slopes Surface shaping of roads to prevent slope slippage and provide special angled stormwater inlets Bulk earthworks (cut to fill, cut to spoil, imported fill and layer works) to create level platforms for buildings and parking areas Water – booster pumps to increase pressure to higher parts of site Bulk stormwater control with stepped cascading structures, special detention structures suitable for steep slopes (above and/or below ground) Sub-surface drainage tied in with stormwater system and with flushing access points for silt clearing
Steep slopes	Sewers – high flow velocities causing inefficient clearing of solids	<ul style="list-style-type: none"> Backdrop manholes, haunching/ramming of sewers to deal with high flow velocities
Steep	Water – inadequate pressure for	<ul style="list-style-type: none"> Booster pumps

slopes	domestic and fire-fighting use	to increase pressure to higher parts of site, <ul style="list-style-type: none"> intermediate storage
Steep slopes	Problems with bulk stormwater control	<ul style="list-style-type: none"> Stepped cascading structures, special detention structures suitable for steep slopes (above and/or below ground)
Steep slopes - Ground water seepage down slopes along drainage paths between permeable and impermeable horizons	<ul style="list-style-type: none"> Slippage (landslides), groundwater reaching surface via artesian wells 	Sub-surface interceptor drains tied in with stormwater system and with flushing access points for silt clearing
Extra costs involved in building on sites with extremely flat slopes:		
Flat slopes	Extremely deep sewer trenches at lower ends, misalignment with municipal connections, etc.	Intermediate sewer pumpstations to deal with sewers that are too deep to connect through gravity into existing reticulation
Flat slopes	Inadequate grades for over site drainage	Bulk earthworks in site shaping to create adequate drainage grades for parking areas, roads, etc.
Flat slopes	Flooding of buildings	Bulk earthworks in lifting floor levels above floodlines
Extra costs involved in building on sites in flood plains:		
Sites in flood plains next to natural or man-made water courses	Inundation when water courses break their normal banks	<ul style="list-style-type: none"> Bulk earthworks in raising natural ground levels and/or Construction of protective berms/"dykes" and drainage systems

GENERAL:		
Site subject to/affected by:	Possible effects:	Examples of precautionary mitigating measures:
Reservation of units for people with physical disabilities in addition to mobility (wheelchair access) and special housing needs (e.g. sight and hearing, loss of movement in upper body limbs)	"Standard" designs and specifications inadequate in enabling independent living for affected people	Design and specification for access, mobility, special fittings, finishes, textures and other features that aid independent living for affected people

3.5.4.6 Extra-ordinary development conditions not recommended for inclusion in the social housing Variation Manual and Calculator

Additional costs caused by the following conditions, although recommended previously for the revision of the existing Variation Manual, are deemed to be part of normal project design and development considerations or not applicable to social housing in restructuring zones (locational issues affecting BNG housing), and therefore, not recommended for inclusion in the proposed Variation manual and calculator:

Condition	Effect and precautions	Reason for not recommending inclusion
Climatic conditions:		
Sites in corrosive coastal or industrial atmospheres	Corrosion of building materials and components requiring precautions such as use of corrosion resistant building materials (Aluminium, PVC or galvanized window and door frames i.l.o. mild steel), galvanized steel balustrading and other metal components, chlorinated rubber paints on structural steel, etc.)	Should be normal design and specification precautions for projects in such areas
Severe hailstorms (designated hail belts)	Damage to roof trims, extra loads on roofs and structures, icing up/blocking of gutters, etc.	Should be normal design and specification precautions for projects in such areas
High winds, including tornadoes (designated areas)	Damage to roofs and structures requiring Improved roof anchoring and bracing, robust roof trims (eaves and verges)	Should be normal design and specification precautions for projects in such areas
Severe lightning (e.g. designated Gauteng areas)	Damage to roof trims, surge damage to electrical installations, etc. requiring Robust roof trims, proper lightning conducting systems, surge protection	Should be normal design and specification precautions for projects in such areas
Special climatic zone requirements of SANS 10400-XA not covered above or in the enhanced IS	Unacceptable solar heat gains and losses due to inadequate insulation, shading, etc. Improved insulation, shading, etc. – cost over and above covered in enhanced IS, if any	Should be normal design and specification precautions for projects in such areas
General issues:		
Heritage issues	Limiting developability and/or causing substantial extra costs	Should be normal design and specification precautions for projects in such areas
OHSA Construction Regulations	Unsafe conditions during construction requiring Extra safety measures required for “working at height”	Social housing is by nature provided in multi-storey buildings. Should be normal construction practice
Sites requiring extensive removal of existing structures	Existing structures/ services interfering with new work requiring removal where required	Should be normal design and specification precautions for projects in such areas

and underground services		
Sites extensively used as dump sites in the past and heavily overlain with refuse and other deleterious material	<ul style="list-style-type: none"> • Health issues • Foundation movement and subsidence 	Covered under the geotechnical conditions section above
Locational issues:		
Location of Development Site (distance from nearest urban centres and building supplies)	Unavailability, delays in supply and increased costs of building materials	Social housing is confined to well-located urban restructuring zones and should not be affected by locational factors applicable to peri-urban and rural areas
Areas with no water supply to site during construction (especially peri-urban and rural projects)	Delays in construction, and requiring carting on by motorised tanker, and/or pumping of water to site from nearest reliable source	Social housing is confined to well-located urban restructuring zones and should not be affected by locational factors applicable to peri-urban and rural areas
Double handling of materials delivered to “difficult to reach sites”	allowance for extra labour required for transferring materials to smaller vehicles for final delivery to site	Social housing is confined to well-located urban restructuring zones and should not be affected by locational factors applicable to peri-urban and rural areas
Severe snowstorms (e.g. Highlands and mountains in Eastern, Northern, Western Cape, Free State, KZN)	Extra loads on roofs and structures requiring Steeper roof pitches, Strengthening of roofs and structures, bigger gutters with hail guards	Social housing is confined to well-located urban restructuring zones and should not be affected by locational factors applicable to peri-urban and rural areas

3.5.4.7 Location issues

When social housing development was confined to gazetted urban restructuring zones (RZs), many locational and climatic challenges affecting mostly peri-urban or rural projects would not be applicable.

However, the introduction of “Directives on Approved Restructuring Zones and the Declared Priority Human Settlements and Housing Development Areas (PHSHDAs) in the Social Housing Projects” in terms of which these PHSHDAs are deemed to serve the purpose of RZs, could place social housing projects in areas affected by locational challenges.

Although likely to be tempered by demand constraints, and while the urban restructuring intent of the social housing programme should always still prevail, provision should still be made for the possibility that some of these issues may well affect social housing projects in the future or where proven.

Some of these locational challenges, although expected to be rare in application, may include for instance, especially in peri-urban, small town and “rural” projects where affordable rental housing could be developed.

3.5.4.8 Variation for extraordinary development conditions affecting greenfield mid-rise tower blocks with lifts

The above apply equally in principle to greenfield newbuild mid to high-rise towers with lifts but would probably to some extent differ in the nature of the precautionary measures and associated costs in the application to low-rise walk-ups and mid-rise towers respectively. One example may be the inclusion of shear walls in a mid-rise structure to counter the effects of seismic acceleration

3.5.4.9 For Brownfield Developments

Brownfields re-developments of existing properties may be affected by some of the conditions above for instance where high ground water tables or slope seepage were not adequately dealt with in the original development and now causes inundation of parking basements and/or waterlogged grounds. The importance of proper evaluation of feasibility before acquisition of existing properties for refurbishment/and/or conversion should, however, be stressed to avoid the need for additional variation costs.

3.6 APPROACH TO AND PRINCIPLES FOR DEVELOPMENT OF THE VARIATION CALCULATOR

3.6.1 General

The uniqueness of each social housing project and the variability in site configuration, density, building typology, unit size and mix makes it very difficult to develop a standard benchmark cost per unit for each of the possible extraordinary development conditions that may affect the development costs on a particular site.

One approach, therefore, would be to base the variation on actual extra costs for each development, using a calculator that is flexible enough to handle variability of social housing site and development configurations. This would, however, render outcomes too loose and open-ended and make it almost impossible to budget for the anticipated variations in a particular budgetary term.

To avoid budget overruns, fixed overall aggregate limits to variation amounts per project are to be established through case-study analysis and benchmarking.

The approach to developing the manual and calculator must be consistent with the National Building Regulations and requirements of the Council for Geo-sciences.

3.6.2 Sample of projects affected by extraordinary development conditions and requiring special precautionary measures and subsidy variation

Documentation relating to five recent projects provided by SHRA (Geotech reports, motivations for variation, project plans, specifications, and cost estimates, etc.) as well as previous studies indicate that almost all of the projects were affected to greater or lesser extent by conditions such as:

- Climatic – projects in designated SCCCA locations
- Geotechnical – expansive clay, compressible/collapsible soils, erodibility of soil through water and/or wind action
- Topographic – steep slopes mostly

The wide variability in the amounts and percentage deviations from standard subsidies as seen above makes it difficult to set typical benchmarks and upper limits to variations.

Information on completed projects will be made available to successful service provider. It is however, required that as part of the assignment the bidder would need to undertake research to benchmark similar projects and costs that are prevalent within the market.

3.6.3 Recommended guideline for approach to development of the variation calculator

Although the total variation amount for a project is reduced to an amount per unit, the determination must be based on a scientific calculation of the actual costs for each precautionary measure:

Example 1: The cost of an interceptor (cut-off) drain to prevent groundwater seepage down a slope will be based on the dimensions (length, width, depth) and composition (geofabric, fill, pipe type and diameter) of such drains, not on a fixed amount per unit

Example 2: The cost of special foundations for a particular soil type: The size and design of foundations are determined by the measures required to transfer the total dead and live load of the building to the ground in such a way that the bearing capacity of the soil is not exceeded, and movement is controlled. The total load of a building consists of all units and other areas on all levels of the building. Although it may appear that units on say the 4th floor are not directly affected by conditions under the ground, the design of foundations and structure will relate to the whole of the building but considering that there is not necessarily a strict linear relationship between additional loading and sizing of foundations and structural elements

To standardise the variations, the following approach to the calculator is suggested:

Although there is no such thing in real life as atypical social housing project, the basis of the calculator should nevertheless be agreed hypothetical typical project for low-rise walk-ups and mid-rise towers respectively, with agreed parameters for each type. (To be discussed and agreed)

The process for calculating variations then as follows:

- Develop standard schematic/diagrammatic site plan for each as per parameters (once agreed)
- Apply cost estimates for each type of extraordinary development condition to that standard development configuration for the low and mid-rises respectively
- Reduce to a cost per standard unit for each type of condition for the low and mid-rises respectively

In other words, say a particular walk-up project affected by extraordinary conditions and applying for the variation is affected by:

- Geotechnical: One of the designated soil classes with poor founding characteristics requiring raft foundations
- Topography: Above normal slopes falling in one of the designated classes, requiring terracing (bulk earthworks to create platforms)
- Geohydrology: High perched water table and seepage along drainage paths as per designation, requiring sub-surface drainage

The cost for applicable precautionary measures for each of the verified and categorised (into appropriate classes) conditions is then estimated on the basis of the cost effect on the agreed standard development configuration in line with the proposed measures as reduced to a cost per unit multiplied by the actual number of units in the real project.

3.7 TIME-FRAME FOR THE ASSIGNMENT

The overall timeframe for completion of the assignment is within three (3) months from date of appointment. A more detailed programme for submission of interim drafts will be agreed with the appointed service provider at inception.

3.8 3.9. SUBMISSION OF PROPOSALS

Signed bids are to be submitted by e-mail to: nevarit@shra.org.za
Proposals must be submitted on or before 16:00 on 12 December 2022

Late bids will not be accepted.

Bids should be submitted in the following format:

- Introductory paragraph summarising the bidder's qualifications and background, experience relevant to this assignment
- Brief approach to the assignment and methodology to be applied
- Confirmation of capacity and availability to complete the work within the designated timeframe
- Detailed schedule of work

- Proposed consultation schedule
- Pricing schedule as per the following table:

No.	Deliverable	Further details	Days	Rate/day	Amount
1	Inception Report	Confirming the consultation methodology as well as any extraordinary conditions and circumstances applicable.			
2	Benchmarking Report	Comparing project costs of comparable developments.			
3	First Draft Variation Manual & Calculator	Submission of draft manual in editable soft copy and full working copy of Excel Calculator populated with real data based on typical concepts and cost estimates			
4	Final Variation Manual and Calculator	Close out report that is accompanied with the final version of the Manual and accompanying Calculator			
	Sub-total:				
	Provision for five working days for presenting to project stakeholders, doing final revisions for final approval				
	TOTAL EXCLUDING VAT				
	VAT				
	TOTAL INCLUDING VAT				

It is expected of bidders to make provision in their quoted prices for all internal and external expertise and resources required for the assignment.

The successful bidder must be available to make presentation(s) and/or field queries for a period of three (3) months post completion of the assignment.

3.10. COST STRUCTURE

The total cost of the project must be provided. The pricing proposal must clearly distinguish each stage and distributed closely to the following table:

No.	Deliverable	% of Total Project Cost
1	Inception Report	15%
2	Benchmarking Report	15%
3	First Draft Variation Manual and Calculator	40%
4	Final Draft Variation Manual and Calculator	20%

Subject to the acceptance of the invoice by SHRA, the service provider will be paid within 30 days from receipt of an invoice and the overall cost should be

Disbursements must be in line with the National Treasury Cost Containment Measures Instruction notes No.7 of 2022/2023 related to Travel and Subsistence which will be reimbursed to the appointed service provider based on the pre-approval by the SHRA and a disbursement invoice is to be always submitted separately proof of payments for all disbursements must be attached to the disbursement invoice claimed.

3.11. CONFIDENTIALITY

Service provider will be contracting with the SHRA and the work to be done will be for the SHRA. All records and data produced through this project in whatever format will be the confidential information and remain as the intellectual property of the SHRA.

All information, documents and records received from the SHRA and any of the related bodies, are to be kept confidential and may not be used or distributed in any format. All data, product including but not limited to standard forms information summary outcomes, presentations and reports will remain the confidential and intellectual property of the SHRA and may not be used or distributed in any format without the written approval of the SHRA.

3.12 PROPOSED SELECTION CRITERIA

3.12.1. Functionality

- Proposed Technical approach of the bidder (see requirements in Part 7);
- Suitability of the proposed bidder (see requirements in Part 8);
- Experience of the Bidder (see requirements in Part 9)

3.12.2. 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.

3.11.1 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.

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	PRESENTATIONS WEIGHT (IF APPLICABLE)	TOTAL SCORE
	Rating out of 5	Evaluation criteria			
Proposed Technical approach and methodology of the bidder:					
<ul style="list-style-type: none"> Bidders understanding of the scope of work (10 points); 	1	Scope of work irrelevant to the assignment.	40%		
	2	Scope of work is referred to but is inaccurate			
	3	Proposal indicates the exact scope of work as per the Terms of Reference			
	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			
<ul style="list-style-type: none"> Methodology as to how the scope of work will be executed including a project plan (30 points); 	1	Short methodology that does not relate to the full scope of work			
	2	Detailed methodology that does not relate to the full scope of work			
	3	Methodology that includes the full scope of work, required timeframes and deliverables			
	4	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that adhere to the terms of reference.			
	5	Methodology that includes the full scope of work, required timeframes and deliverables. Inclusion of a project plan which indicates activities and timeframes that adhere to the terms of reference. Project plan also includes person days of work of each activity and the resource/s that will undertake each activity.			
Suitability of the proposed team, and experience:	Rating out of 5	Evaluation criteria			
<ul style="list-style-type: none"> The bidder/ team leader must have the required skills and experience. (25 points); 	1	The bidder/ team leader has no relevant degree or qualification in Engineering or Quantity Surveyor (QS) with less than five (5) year's experience.	45%		
	2	The bidder/ team leader has relevant degree or qualification in Engineering or Quantity Surveyor (QS) with more than five (5) years but less than ten (10) years' experience.			
	3	The bidder/ team leader has relevant degree or qualification in Engineering or Quantity Surveyor (QS) with minimum 10 years' experience.			
	4	The bidder/ team leader has relevant degree or qualification in Engineering or Quantity Surveyor (QS) with between ten (10) to fifteen (15) years' experience.			
	5	The bidder/ team leader has relevant degree or qualification in Engineering or Quantity Surveyor (QS) with more than fifteen (15) years' experience.			
The Team must have the required skills and experience In the following areas:	1	The team is comprised of members qualified and professionally registered across all the disciplines with between one (1) to three (3) years' experience in each of the respective fields.			

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	PRESENTATIONS WEIGHT (IF APPLICABLE)	TOTAL SCORE
	Rating	Evaluation criteria			
<ul style="list-style-type: none"> Geotechnical engineering Structural engineering Quantity surveying Civil engineering (20 points).	2	The team is comprised of members qualified and professionally registered across all the disciplines with between four (4) to six (6) years' experience in each of the respective fields.			
	3	The team is comprised of members qualified and professionally registered across all the disciplines with between seven (7) to nine (9) years' experience in each of the respective fields.			
	4	The team is comprised of members qualified and professionally registered across all the disciplines having between ten (10) to twelve (12) years' experience in each of the respective fields.			
	5	The team is comprised of members qualified and professionally registered across all the disciplines having more than twelve (12) years' experience in each of the respective fields.			
Suitability of the bidder:	Rating out of 5	Evaluation criteria	15%		
<ul style="list-style-type: none"> Letters of reference with contactable references must provide proof that the bidder or team has successfully undertaken five (5) relevant projects. (15 points); 	1	Less than three (3) relevant references provided			
	2	Three (3) to four (4) relevant references provided			
	3	Five (5) relevant reference letters provided			
	4	Six (6) relevant references provided			
	5	More than six (6) relevant reference letters provided.			
TOTAL POINTS	100		100%		

N/B: Bidders need to obtain a minimum of 70% for functionality for them to be evaluated further on the 80/20 preference point system

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

ANNEXURES

- *Annexure A: National Housing Code Volume 2 (2009) Technical and General Guidelines: [Variation Manual \(pages 51-72\)](#)*
- *Annexure B: Example of the Variation Calculator for National Housing Programmes.*

SECTION B

1. SPECIAL CONDITIONS OF CONTRACT

1.1. GENERAL

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

1.2. ADDITIONAL INFORMATION REQUIREMENTS

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

1.3. CONFIDENTIALITY

1.3.1. The bid and all information in connection therewith shall be held in strict confidence by bidders and usage of such information shall be limited to the preparation of the bid. Bidders shall undertake to limit the number of copies of this document.

1.3.2. All bidders are bound by a confidentiality agreement preventing the unauthorised disclosure of any information regarding the SHRA or of its activities to any other 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. WARRANTIES

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

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

1.7. PARTIES NOT AFFECTED BY WAIVER OR BREACHES

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

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

1.8. RETENTION

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

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

2. GENERAL CONDITIONS OF CONTRACT

2.1 The General Conditions of Contract must be accepted. The general conditions applicable to government entity bids, contracts and order are attached herein as **Annexure 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/PDF/07/202223 **DATE:** 12th December 2022 **CLOSING TIME:** 16h00

DESCRIPTION: The appointment of a service provider to develop a subsidy variation model specifically for application in medium-density multi-storey social housing projects and cost benchmark exercise

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: nevarit@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 Monday, 12th December 2022.

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/PDF/07/202223	CLOSING DATE:	12 th December 2022	CLOSING TIME:	16h00
DESCRIPTION	The appointment of a service provider to develop a subsidy variation model specifically for application in medium-density multi-storey social housing projects and cost benchmark exercise.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Email address: nevarit@shra.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Thinadzanga Nevari		CONTACT PERSON	Ms Thinadzanga Nevari	
TELEPHONE NUMBER			TELEPHONE NUMBER		
E-MAIL ADDRESS	nevarit@shra.org.za		E-MAIL ADDRESS	nevarit@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/PDF/07/202223
CLOSING TIME 16h00	CLOSING DATE: 12 th December 2022

OFFER TO BE VALID FOR **90** DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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- The accompanying information must be used for the formulation of proposals.
- 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.

.....

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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.

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or 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

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.

provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

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

SBD 6.1

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

1. POINTS AWARDED FOR PRICE

1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

2. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 2.1 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

3. **BID DECLARATION**

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

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

4.1 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.

5. **SUB-CONTRACTING**

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

(Tick applicable box)

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

5.1.1 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		

6. 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	

7. DECLARATION WITH REGARD TO COMPANY/FIRM

7.1 Name of company/firm:.....

7.2 VAT registration number:.....

7.3 Company registration number:.....

7.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
 - One person business/sole propriety
 - Close corporation
 - Company
 - (Pty) Limited
- [TICK APPLICABLE BOX]

7.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

7.6 COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

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

7.8 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.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>
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<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p>
<p>DATE:</p> <p>ADDRESS</p> <p>.....</p> <p>.....</p>

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: Submitted an original/ certified copy of a valid BBEE Certificate. <i>(In case of a trust, consortium or joint venture, bidders will qualify for points for their 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>	
6.	Part 6: Submitted the General Conditions of Contract (initialled each page)	
7.	Part 7: Submitted the Technical approach	
8.	Part 8: Submitted the Details of the team and included their CV	
9.	Part 9: Submitted Experience in the field document and 3 reference letters	
10.	Part 10: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration	