



**PART A**  
**INVITATION TO BID/ REQUEST FOR QUOTATION (RFQ)**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE KZN DEPARTMENT OF HUMAN SETTLEMENTS**

|                   |                |               |                   |               |              |
|-------------------|----------------|---------------|-------------------|---------------|--------------|
| QUOTATION NUMBER: | <b>Q110/22</b> | CLOSING DATE: | <b>31/08/2022</b> | CLOSING TIME: | <b>11H00</b> |
|-------------------|----------------|---------------|-------------------|---------------|--------------|

|             |  |
|-------------|--|
| DESCRIPTION | APPOINTMENT OF A MULTI-DISCIPLINARY CONSULTING FIRM (ARCHITECT, ENGINEER, AND QUANTITY SURVEYOR) TO DESIGN AND DETERMINE THE COSTING OF FIVE (5) GREEN HOUSING TYPOLOGIES. |
|-------------|--|

**RFQ RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE QUOTATION BOX NUMBER: 03 IN THE LIFT FOYER OF THE TWELVETH FLOOR. SITUATED AT EAGLE BUILDING OR EMAILED TO [quotations@kzndhs.gov.za](mailto:quotations@kzndhs.gov.za). CLARITY, ADVICE MAY BE DIRECTED TO THE FOLLOWING OFFICIALS OR THE BID ADVICE CENTRE ON THE 12<sup>TH</sup> FLOOR, EAGLE BUILDING, 353-363 DR PIXELY KASEME STREET, DURBAN FROM 08H00 TO 15H00 BETWEEN MONDAY TO FRIDAY**

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

|                  |   |                  |   |
|------------------|---|------------------|---|
| CONTACT PERSON   | <b>THABILE NGWENYA</b>  | CONTACT PERSON   | <b>SARIKA KAMTHA</b>  |
| TELEPHONE NUMBER | <b>031 336 5162</b>   | TELEPHONE NUMBER | <b>076 850 5233</b>   |
| FACSIMILE NUMBER | <b>N/A</b>  | FACSIMILE NUMBER | <b>N/A</b>  |
| E-MAIL ADDRESS   | <b><a href="mailto:Thabile.ngwenya@kzndhs.gov.za">Thabile.ngwenya@kzndhs.gov.za</a></b> | E-MAIL ADDRESS   | <b><a href="mailto:Sarika.Kamtha@kzndhs.gov.za">Sarika.Kamtha@kzndhs.gov.za</a></b> |

SIGNATUER OF COMPILER:  DATE: **19/08/2022**

**SUPPLIER INFORMATION (PLEASE FILL IN BLANK COLUMNS) INFORMATION**

|  |   |  |                                     |   |      |
|--|---|--|-------------------------------------|---|------|
| NAME OF BIDDER                               |   |  |                                     |   |      |
| POSTAL ADDRESS                               |   |  |                                     |   |      |
| STREET ADDRESS                               |   |  |                                     |   |      |
| TELEPHONE NUMBER                             | CODE  |  | NUMBER                              |   |      |
| CELLPHONE NUMBER                             |   |  |                                     |   |      |
| FACSIMILE NUMBER                             | CODE  |  | NUMBER                              |   |      |
| E-MAIL ADDRESS                               |   |  |                                     |   |      |
| VAT REGISTRATION NUMBER                      |   |  |                                     |   |      |
| SUPPLIER COMPLIANCE STATUS                   | TAX COMPLIANCE SYSTEM PIN:  |  | OR                                  | CENTRAL SUPPLIER DATABASE No:   | MAAA |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE | TICK APPLICABLE BOX<br><input type="checkbox"/> Yes <input type="checkbox"/> No |  | B-BBEE STATUS LEVEL SWORN AFFIDAVIT | TICK APPLICABLE BOX<br><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<br>[IF YES ENCLOSE PROOF] | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER THE QUESTIONNAIRE BELOW] |
|---|--|--|--|

**QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

|  |  |
|--|--|
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?  | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?   | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?  | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| <b>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.</b> |  |



**PART B  
 TERMS AND CONDITIONS FOR BIDDING**

|                                       |  |
|---------------------------------------|--|
| <b>1. BID/ RFQ SUBMISSION:</b>        |  |
| 1.1.                                  | BIDS/RFQ MUST BE DELIVERED BY OR BEFORE THE STIPULATED CLOSING DATE AND 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/RFQ IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000, 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), IF APPLICABLE.  |
| 1.5.                                  | QUOTATION DOCUMENT (RFQ) MUST BE COMPLETED IN FULL WITH ACCURATE INFORMATION WHICH IS IN LINE WITH INFORMATION SUBMITTED TO CENTRAL SUPPLIERS DATEBASE (CSD). ANY CONTRARY, FALSE AND INCORRECT INFORMATION IN SBD FORMS WILL DISQUALIFY THE BID. DECLARE ALL INFORMATION IN RESPECT OF COMPANIES YOU HAVE INTEREST ON AS PER SBD 4 PARAGRAPH 2 BIDDERS DECLARATION. |
| 1.6.                                  | SERVICE PROVIDER TO ENSURE THAT CENTRAL SUPPLIERS DATABASE IS REGULARY UPDATED INORDER TO BE DEEMED COMPLIANT IN RESPECT OF TAX COMPLIANT STATUS AND OTHER RETURNABLE DOCUMENTS. FAILING TO REGULARLY UPDATE THE SAME MAY RESULT IN YOUR QUOTATION BEING PASSED OVER.  |
| 1.7.                                  | PROOF OF ADDRESS MUST BE SUBMITTED WITH RFQ.   |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b> |  |
| 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/RFQ WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.   |
| 2.6                                   | WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.  |
| 2.7                                   | NO BIDS/RFQ WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."  |

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

SIGNATURE OF BIDDER: .....

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

DATE: .....



**PART C  
 PRICING SCHEDULE – FIRM PRICING**

| REQUEST FOR QUOTATION FOR THE SUPPLY AND DELIVERY OF GOODS AND SERVICES AS PER SPECIFICATIONS AND OR SCOPE OF WORK |  |       |             |                       |
|--|--|-------|-------------|-----------------------|
| ITEM NO  | DESCRIPTION OF GOODS/ SERVICES   | HOURS | HOURLY RATE | TOTAL PRICE EXCL. VAT |
|  | APPOINTMENT OF A MULTI-DISCIPLINARY CONSULTING FIRM (ARCHITECT, ENGINEER, AND QUANTITY SURVEYOR) TO DESIGN AND DETERMINE THE COSTING OF FIVE (5) GREEN HOUSING TYPOLOGIES/CONCEPTS TO GUIDE THE DEPARTMENTS IMPLIMENTATION OF GREENING AND CLIMATE CHANGE PROJECTS AS PER THE ATTACHED SPECIFICATION.<br><br>THE NUMBER OF HUORS SHOULD NOT EXCEED 150 PER PROFESSIONAL AND ALL OTHER ALLOWENCES SHOULD CATERED FOR. |       |             |                       |
| 01   | ARCHTECT   |       |             |                       |
| 02   | QUANTITY SURVETOYR   |       |             |                       |
| 03   | STRUCTURAL ENGINEER  |       |             |                       |
|  |  |       |             |                       |
|  |  |       |             |                       |
|  | <b>TOTAL PRICE</b>   |       |             |                       |

**THIS QUOTATION IS SUBJECT TO THE FOLLOWING**

- SERVICE PROVIDERS TO QUOTE ON TOTAL PRICE AND NOT UNIT PRICE  
NOTE: ALL DELIVERY COSTS MUST BE INCLUDED IN THE BID PRICE, FOR DELIVERY AT THE PRESCRIBED DESTINATION
- ONLY QUOTATIONS THAT ARE R200 000.00 AND ABOVE WILL BE OPEN IN PUBLIC
- QUOTATIONS SHOULD BE VALID FOR A MINIMUM PERIOD OF 60 DAYS UNLESS OTHERWISE STIPULATED

**PLEASE CIRCLE THE CORRECT ANSWER**

- a) Validity of quotation 60 days unless otherwise stipulated .....
- b) Delivery period .....
- c) Are prices quoted firm? Yes/No
- d) Registration on CIDB? if applicable Yes/No  
 Registration Number.....  
 Registered on NHBRC? If applicable Yes/No  
 Registration Number.....
- e) Applicable ONLY to equipment and machinery
- (i) Whether spares carried in stock? Yes/No
- (ii) Whether maintenance carried out if required? Yes/No
- (iii) What is the period of guarantee? (COMPULSORY) .....
- (iv) Make and model.....
- f) Is offer strictly accordingly to specification? Yes/No  
 If no give variation.....
- g) Please NOTE: If you didn't hear from the Department within the period of 6 weeks, please consider your quote being unsuccessful.
- h) Any alteration on price must be initiated, if not the quote will not be considered.
- i) The use of correction fluid is prohibited.
- j) Please fill in the attached Declaration of Interest (SBD4) \*compulsory\*

**CONTACT PERSON OF SUPPLIER**

**COMPANY STAMP**

NAME: .....

SIGNATURE: .....

DATE: .....

## **SCOPE OF WORK:**

**All house design and costing to be done based on the Department's standard 40m<sup>2</sup> units:**

- a. Design house layouts for different climatic zones and/or extreme weather events that will be resilient against torrential rain, heavy winds and fires,
- b. Design house layouts with a garden space attached (container/rooftop gardening)
- c. Design houses that incorporate the installation of solar panels/geysers/energy saving electrical fittings,
- d. Design houses that incorporate the installation of rainwater harvesting tanks/water management plumbing fittings,
- e. Design houses that use green construction material and technology
- f. Design houses that involve green construction methods and labour practices.

**Additionally, the professional team will be required to:**

- a. Design systems and layouts,
- b. Compile detailed Bill of Quantities for each design,
- c. Read design specifications and technical drawings,
- d. Research suitable solutions and estimate cost and timescales,
- e. Make models and prototypes of the typologies using three-dimensional design software,
- f. Liaise with others in the design team,
- g. Liaise with clients and stakeholders,
- h. Attend meetings at the Departments,
- i. Design and conduct research,
- j. Record, analyse and interpret precedent research,
- k. Make recommendations to the Department,
- l. Qualify the final layouts or systems,
- m. Prepare project documentation, write reports and give presentation.

## **Requirements of the professional team:**

The role of the professional service providers will be to give valuable current day market related input into the technical and functional systems and material that are required to produce green/eco housing design.

- a. **Architect:**
  - to complete designs and deal with local and Municipal jurisdictions about regulations and building codes.
  - To ensure compliance with local planning and zoning laws.
- b. **Quantity Surveyor:**
  - To give input to all cost related to building, structural and civil engineering from initial calculations to final figures.
  - To ensure value for money by minimizing project cost while achieving the required standards and quality.
- c. **Structural Engineer:**
  - To analyse, design, plan and research structural components and systems to achieve design goals.
  - Ensure safety and comfort for occupants.

## STAGE 1 – ELIGIBILITY CRITERIA

IN ADDITION TO ALL REQUIREMENTS A COMPREHENSIVE COMPANY PROFILE MUST BE ATTACHED DETAILING ALL INFORMATION REQUIRED AS PER STAGE 1 OF EVALUATION CRITERIA, FOR THE PROGRESSION TO STAGE 2, SERVICE PROVIDERS MUST SCORE A MINIMUM OF **60%** OF TOTAL POINTS AND PROFILE MUST HAVE TRACEABLE REFERENCES WITH A PROVEN TRACK RECORD. DOCUMENTARY PROOF OF COMPLETED CONTRACTS MUST BE ATTACHED.

| Key Aspects  | Basis for Point Allocation   | Score                 | Max Points       |
|--|--|-----------------------|------------------|
| Methodology  | <b>Define a clear methodology for designing green building typologies by incorporating sustainable design techniques:</b> <ul style="list-style-type: none"> <li>An outline of the process to be followed to design and cost 5 green building typologies (40sqm housing unit) <b>(15 points)</b></li> <li>Demonstration of sustainable features and principles to be incorporated in the design process (energy efficiency, water efficiency, material efficiency, waste reduction) <b>(10 points)</b></li> <li>Technique / tools / software to be used for the drawing and calculate process <b>(5 points)</b></li> </ul> | <b>Good<br/>19-30</b> | <b>30 points</b> |
|  | Acceptable (in terms of above)   | <b>Fair<br/>13-18</b> |                  |
|  | Lacks the appropriate level of experience (in terms of above)  | <b>Poor<br/>0-12</b>  |                  |
| Relevant Experience  | <b>Multi-disciplinary consulting firm to indicate relevant experience in terms of number of completed similar projects undertaken by architects, structural engineers and quantity surveyors in relation to green sustainable building typologies and costing. Reference letters signed by respective institutions must be attached for each project completed.</b>  |                       |                  |
|  | 4 or more similar projects successfully completed - provide 4 and above reference letters <b>(30 points)</b>   | <b>30 points</b>      |                  |
|  | 3 similar projects successfully completed – provide 2 to 4 reference letters <b>(15 points)</b>  |                       |                  |
|  | 2 similar projects successfully completed – provide 2 letters <b>(10 points)</b>   |                       |                  |
|  | 1 similar project successfully completed - provide 1 reference letter <b>(5 points)</b>  |                       |                  |
| 0 similar projects – No reference letter – <b>0 points</b> |  |                       |                  |
| Resources Organogram                                       | <b>Resource Organogram</b><br>Detailed Organogram with curriculum vitae's detailing the duties and responsibilities of the following professionals coupled with their experience (minimum 3 years): <b>(15 points)</b><br>An Architect<br>A Structural Engineer<br>A Quantity surveyor   | <b>Good</b>           | <b>30 points</b> |
|  | Organogram / stakeholders is acceptable- professionals with 2 years of experience <b>(10 points)</b>   | <b>Fair</b>           |                  |
|  | Lacks appropriate, applicable and relevant skills and resources and experience- less than 2 years of experience <b>0-5 points</b>  | <b>Poor</b>           |                  |
| Financial Capacity   | Financial viability to be proven by supplying credit rating letter from the bank. Credit rating:<br>Category A – <b>5 points</b>   | <b>Good</b>           | <b>10 points</b> |
|  | Category B – <b>3 points</b>   | <b>Fair</b>           |                  |
|  | Category C – <b>2 points</b>   | <b>Poor</b>           |                  |
|  | Did not provide bank rating letter - <b>0 points</b>   |                       |                  |
| <b>TOTAL</b>   |  |                       | <b>100</b>       |

## STISAGE 2 – 80/20 PREFERENCE POINTS SYSTEM

The 80/20 Preference Points System will be utilized. In terms of Regulation 6 (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>B-BBEE Status Level of Contributor</b> | <b>Number of points (80/20 system)</b> |
|---|--|
| 1   | 20                                     |
| 2   | 18                                     |
| 3   | 14                                     |
| 4   | 12                                     |
| 5   | 8                                      |
| 6   | 6                                      |
| 7   | 4                                      |
| 8   | 2                                      |
| Non-compliant contributor                 | 0                                      |



## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

2.2 Do you, or any person connected with the bidder, have a relationship

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

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....  
.....

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

2.3.1 If so, furnish particulars:

.....  
.....

**3 DECLARATION**

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.



institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....  
Signature Date

.....  
Position Name of bidder

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

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

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

**1. GENERAL CONDITIONS**

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

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

1.2

- a) The value of this bid is estimated to ~~exceed~~ **not exceed** R50 000 000 (all applicable taxes included) and therefore the 80/20 ~~.....~~ preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

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

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

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

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

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



A maximum of 80 or 90 points is allocated for price on the following basis:  
**80/20** or **90/10**

$$Ps = 80 \left( 1 + \frac{Pt - Pmax}{Pmax} \right) \text{ or } Ps = 90 \left( 1 + \frac{Pt - Pmax}{Pmax} \right)$$

Where

- Ps = Points scored for price of bid under consideration  
 Pt = Price of bid under consideration  
 Pmax = Price of highest acceptable bid

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

- 5.1 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 (90/10 system) | Number of points (80/20 system) |
|------------------------------------|---------------------------------|---------------------------------|
| 1                                  | 10                              | 20                              |
| 2                                  | 9                               | 18                              |
| 3                                  | 6                               | 14                              |
| 4                                  | 5                               | 12                              |
| 5                                  | 4                               | 8                               |
| 6                                  | 3                               | 6                               |
| 7                                  | 2                               | 4                               |
| 8                                  | 1                               | 2                               |
| Non-compliant contributor          | 0                               | 0                               |

## 6. BID DECLARATION

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

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

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

## 8. SUB-CONTRACTING

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

(Tick applicable box)

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

- 8.1.1 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:

| <b>Designated Group: An EME or QSE which is at last 51% owned by:</b> | <b>EME</b><br>√ | <b>QSE</b><br>√ |
|---|-----------------|-----------------|
| 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                                |                 |                 |
| <b>OR</b>   |                 |                 |
| Any EME   |                 |                 |
| Any QSE   |                 |                 |

**9. DECLARATION WITH REGARD TO COMPANY/FIRM**

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

9.2 VAT registration number:.....

9.3 Company registration number:.....

**9.4 TYPE OF COMPANY/ FIRM**

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

[TICK APPLICABLE BOX]

**9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

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**9.6 COMPANY CLASSIFICATION**

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

[TICK APPLICABLE BOX]

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

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

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

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| <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> |
|--|