



## Request for Proposals (RFP)

### The provision of Real Estate Advisory services to the CSIR

**RFP No. 3233/18/10/2018**

Date of Issue	Friday, 28 September 2018	
Closing Date	Thursday, 18 October 2018	
Place	Tender box, CSIR Main Reception, Gate 3 ( North Gate)	
Compulsory Briefing session	Thursday, 04 October 2018 @10H00, Venue: ICC Amber Boardroom, CSIR International Convention Centre, Pretoria	
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

## TABLE OF CONTENTS

<b>SECTION A – TECHNICAL INFORMATION</b>	<b>3</b>
<b>1 INTRODUCTION</b>	<b>3</b>
<b>2 BACKGROUND</b>	<b>3</b>
<b>3 INVITATION FOR PROPOSAL</b>	<b>4</b>
<b>4 PROPOSAL SPECIFICATION</b>	<b>5</b>
<b>5 TERMS OF REFERENCE</b>	<b>6</b>
<b>6 FUNCTIONAL EVALUATION CRITERIA</b>	<b>9</b>
<b>7 ELIMINATION CRITERIA</b>	<b>11</b>
<b>8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION</b>	<b>11</b>
<b>SECTION B – TERMS AND CONDITIONS</b>	<b>12</b>
<b>9 VENUE FOR PROPOSAL SUBMISSION</b>	<b>12</b>
<b>10 TENDER PROGRAMME</b>	<b>12</b>
<b>11 SUBMISSION OF PROPOSALS</b>	<b>13</b>
<b>12 DEADLINE FOR SUBMISSION</b>	<b>13</b>
<b>13 AWARDING OF TENDERS</b>	<b>13</b>
<b>14 EVALUATION PROCESS</b>	<b>13</b>
<b>15 PRICING PROPOSAL</b>	<b>14</b>
<b>16 VALIDITY PERIOD OF PROPOSAL</b>	<b>15</b>
<b>17 APPOINTMENT OF SERVICE PROVIDER</b>	<b>15</b>
<b>18 ENQUIRIES AND CONTACT WITH THE CSIR</b>	<b>15</b>
<b>19 MEDIUM OF COMMUNICATION</b>	<b>15</b>
<b>20 COST OF PROPOSAL</b>	<b>15</b>
<b>21 CORRECTNESS OF RESPONSES</b>	<b>16</b>
<b>22 VERIFICATION OF DOCUMENTS</b>	<b>16</b>
<b>23 SUB-CONTRACTING</b>	<b>16</b>
<b>24 TRAVEL EXPENSES</b>	<b>17</b>
<b>25 ADDITIONAL TERMS AND CONDITIONS</b>	<b>17</b>
<b>26 CSIR RESERVES THE RIGHT TO</b>	<b>18</b>
<b>27 DISCLAIMER</b>	<b>18</b>
<b>DECLARATION BY TENDERER</b>	<b>19</b>
<b>28 ANNEXURE A: SCORING SHEET TO BE USED TO EVALUATE FUNCTIONALITY</b>	<b>20</b>
<b>29 ANNEXURE B: BIDDER’S EXPERIENCE</b>	<b>22</b>
<b>30 ANNEXURE C: BIDDER’S PROPOSAL / VALUE PROPOSITION</b>	<b>23</b>

## **SECTION A – TECHNICAL INFORMATION**

### **1 INTRODUCTION**

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

### **2 BACKGROUND**

The CSIR is currently developing its organisational strategy with emphasis on industrial development, where the thrust of the organisation is to build on its research and development base to drive innovation to improve South Africa's industrial competitiveness, particularly in the advent of the Fourth Industrial Revolution. Furthermore, the CSIR Board has approved a Campus Master Plan (CMP) which sets out a long term vision for development of the CSIR's campus in support of its mandate.

Consistent with the CSIR's goals to attract and retain top scientists and researchers, the Campus Master Plan has identified a need to expand the current on-site accommodation to provide modern multi-use accommodation options for visiting researchers, CSIR personnel (short and medium stay i.e. relocation), and visiting PHD students as well as delegates attending business events at the CSIR International Convention Centre (ICC).

The aim is to create 24/7 access to the campus in a safe and secure environment by providing modern, flexible, multi-use accommodation, which takes advantage of the natural bush surrounds, at a reasonable market related cost, and to create a precinct on the CSIR campus that boasts a vast range of on-site social and recreational facilities for staff, guests and stakeholders to form its own vibrant innovation community aimed to improve the quality of life of staff, social opportunities and overall staff wellness and experience.

CSIR has commissioned and concluded a market study and pre-feasibility study to determine the viability of the development of commercial overnight accommodation on the

CSIR campus, which indicated that there is sufficient demand for such on-site accommodation. To take the development further the CSIR is considering a long term ground lease of the undeveloped land to a developer and operator.

CSIR requires services of a real estate/on-site accommodation development advisory firm / transaction advisor to advise the CSIR of the available and most suitable real estate transactional options (ground lease vs long term lease, PPP, master developer etc.), to assist with soliciting proposals from developers, evaluate proposals, negotiate and conclude the real estate transaction, to bring the proposed development to market in a manner that will promote the most cost effective development of the property and protect the CSIR against risk, to meet CSIR's strategic objectives.

Bids from both commercial real estate firms and a professional industry leader with global expertise will be considered.

### **3 INVITATION FOR PROPOSAL**

Proposals are hereby invited for the provision of Real Estate Advisory services to the CSIR for the development of an on-site accommodation / overnight establishment.

## 4 PROPOSAL SPECIFICATION

All proposals are to be submitted in a format specified in this RFP. However, tenderers are welcome to submit additional / alternative proposals over and above the originally specified format.

Bidders are to submit responses in the following format prescribed below. Failure to adhere to this may result in disqualification and the tender will be deemed as non-responsive.

### 4.1 Technical Proposal

The following must be submitted as part of the **technical** proposal:

- Covering letter;
- Company profile;
- Experience and track record as the lead consultant in providing similar advisory services; and
- Provide a methodology and approach for the proposed required solution- This should include a project plan.

### 4.2 Financial Proposal:

The following must be submitted as part of the **financial** proposal:

- Cover Letter;
- Proposed cost/ commercial offer- must have clear breakdowns as well as the total final cost;
- Certified copy of B-BBEE certificate; and
- CSD registration report (RSA suppliers only).

## 5 TERMS OF REFERENCE

### 5.1 Scope of services

The real estate transaction advisor will be required to undertake tasks related to all aspects of the proposal culminating into successful completion of the transaction.

The scope of work, would, inter alia include but will not be limited to advising and assisting the CSIR on modalities of various lease options and the timing; preparation of all documents such as the Expression of Interest (EOI), Request for Proposal (RFP), Confidentiality Agreement etc.; structuring the transaction; suggesting measures to fetch optimum lease/concession amount; inviting and evaluating the bids, assisting and professionally guiding CSIR during the negotiations, drawing up of the agreements, facilitating the signing thereof and advising CSIR on all related matters.

The scope of work is as follows:

#### 5.1.1 **Phase I:** *Provide a strategic road map for bringing the development to market in a manner that will promote the most effective development of the property and protect the CSIR against risk.*

Advisory services in this phase include:

- a) Assessment of risks to the CSIR for a development project at this site, and provision of recommendations on how to mitigate risk;
- b) Advise on available methods and deal structures (i.e. land sale vs ground-lease, joint venture, master developer, or other transactional options) their advantages and disadvantages, to inform the decision of the CSIR deal structure to maximize value and reduce CSIR's risk;
- c) Advising on the timing of the transaction process, preparing and submitting a detailed project plan and operational scheme to successfully implement the process, indicating tentative timelines for each activity.
- d) Advise on key elements that should be required by the CSIR in an RFP, and elements that should be left open and flexible to the market; and
- e) Produce and present a final strategic road map for use by CSIR management through the next stages in the project including pros and cons of alternate approaches.

**Deliverable I:** A strategic road map for use by CSIR management through the next stages in the project including pros and cons of alternate approaches.

**5.1.2 Phase II:** *Manage a transparent process of bidding/interest solicitation from potential Developers/ Lessees / Investors.*

This includes the following advisory services:

- a) Positioning the development proposals to generate interest among the prospective Investors;
- b) Preparing the solicitations, as advised in Phase I) for the sale/lease/development of the property through competitive bidding, including:
  - a. preparation and issuance of advertisement/RFP etc.;
  - b. organizing pre-bid meeting(s) and compulsory site visit(s);
  - c. providing the prospective Lessees / Investors / Developers with information on the asset and the transaction;
  - d. analysis of and framing/drafting replies to queries of prospective Lessees / Investors / Developers and making necessary modifications, if required in the bid documents;
- c) Evaluation of bids from prospective Lessees / Investors / Developers and preparation of requisite documents leading to short listing of bidders for negotiations.
- d) Evaluation of proposals received in response to solicitations by the CSIR from the development community; oversee and advise the CSIR during the ranking, selection, and negotiation process through execution of a development agreement.
- e) Working collaboratively with the Supplier Selection Committee, the CSIR CFO, CSIR internal appropriate departments and other property market participants, executing the bidding process, reviewing Proposals from bidders including verification of any market research, assumptions, financial modelling included in the proposals; and creating detailed comparisons of alternate bids for use by the CSIR.
- f) Analysing and summarising proposed leases, contracts, terms sheets, and other agreements necessary for the real estate transaction;

- g) Recommending the fair value, price for long leasing considering the valuation; of **the on-site accommodation** based on the possible methods like relative valuation; Discounted Cash Flow, opportunity cost valuation with different scenario(s) or any other suitable method and highlighting the pros and cons of various methods. The Transaction Advisor will consider various options and implications and suggest valuation based on different options. The CSIR will have the option of second valuation done from any other agency.

**Deliverable II:** Evaluation Report with recommended bidder/s and recommended fair value for the ground lease based on detailed financial evaluation.

**5.1.3** **Phase III:** *Advise CSIR on the technical aspects to be included in the contracting process in consultation with CSIR legal specialists including:*

- a) Negotiations and preparation of Contracts / Agreements;
- b) Preparation and execution of requisite agreements (Lease Agreement etc.), and all legal documentation required for execution of the transaction on behalf of CSIR,
- c) Concluding the required agreements,
- d) Ensuring compliance of applicable regulatory requirements including obtaining statutory approvals and clearances, zoning rights and corporate governance procedures wherever necessary, as may be required in order for the project to commence until conclusion, ensuring that agreement terms and conditions are acceptable to CSIR, and coordinating and monitoring the progress of the transaction until its completion.
- e) Advising the CSIR on the required funding instruments required to complete the development, where necessary and as needed, assist CSIR to identify and tap into sources of financing for on-site accommodation construction.
- f) Assisting in closure of the transaction and providing any other analytical and transactional support required by CSIR for successful completion of the transaction.

**Deliverables III:** Concession Agreement



**5.1.4** **Phase IV:** *Serve as the CSIR’s commercial real estate advisor through subsequent build-out period in the event that issues arise relating to compliance with the development agreement.*

- a) Advising on post-lease matters, if any.

The ToR mentioned above are indicative and non-restrictive in nature. There may be some services relevant but not expressly captured in the aforesaid Scope of Work, which upon being brought to the notice of the Transaction Advisor by Authority will also form an integral and mandatory part of the ToR without any extra cost.

**5.2 Outcomes / deliverables**

The deliverables of the Project are as follows:

1. Strategic Roadmap
2. Preparation and issue of solicitation documents
3. Bid evaluation Report
4. Detailed Report & Financial Model
5. Preparation of Concession Agreements
6. Signing of Agreement

**6 FUNCTIONAL EVALUATION CRITERIA**

**6.1** The evaluation of the functional / technical detail of the proposal will be based on the following criteria:

**Phase 1: The first phase includes functionality using the following criteria:**

<b>ELEMENT</b>	<b>WEIGHT</b>
The Bidder’s Experience	50
The Bidder’s Recommendation/ Reference Letters	5
The Bidder’s Capacity of Resources/ Experts	20
The Bidder’s Value Proposition	25
<b>TOTAL</b>	<b>100</b>

## 6.2 Required documentation

ELEMENT	SUB-CRITERIA AND DOCUMENTS REQUIRED	WEIGHT
<b>Bidder's relevant experience</b>	<p>The bidder or resources/ experts in its current employ must have demonstrable transaction experience in successfully executing similar projects.</p> <p>Demonstrable experience in successfully executing projects in different sectors of the global economy will be an added advantage.</p> <p>The bidders must submit, as part of its proposal, details of recent projects the bidder has worked on in real estate advisory service specifically ground leases, on-site accommodation development and operations.</p> <p>Indicate the bidder's involvement in similar projects with associated deliverables and duration of the assignments, contract amount and the following reference information:</p> <ul style="list-style-type: none"> <li>• Client Name</li> <li>• Project Description</li> <li>• Project Cost</li> <li>• Project Period</li> <li>• Description of service performed and extent of Bidder's responsibilities</li> <li>• Name, Title, telephone and email address for reference contact person</li> </ul>	<b>50</b>
<b>Contactable reference letters</b> (minimum of three references).	<p>The bidder must provide reference/ recommendation letter(s) from a client(s) where the bidder <b>recently</b> provided each service category the bidder is bidding for.</p> <p>The bidder must also furnish the CSIR with relevant contact details of its key clients for reference check purposes</p>	<b>5</b>
<b>Bidder's proposed Team and capacity of resources</b>	<p>The bidder must have in its current employ, resources/ experts that have experience in the relevant sector.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• List of resources/ expert(s) in the current bidder's employ. Please indicate which resources have relevant experience in which previous projects.</li> <li>• CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to real estate transaction services.</li> </ul>	<b>20</b>
<b>Bidders Technical Approach and Methodology</b>	<p>Please indicate your firm's value proposition to the CSIR and indicate what sets you apart.</p> <p>The proposal must include:</p>	<b>25</b>

	<ul style="list-style-type: none"> <li>• How the bidder will ensure that the CSIR gets the best deal out of a transaction.</li> <li>• Outline the bidder's approach include the work-plan;</li> <li>• Outline the bidder's quality control procedures;</li> <li>• How the bidder will maintain efficient communication with the client etc.</li> </ul>	
<b>TOTAL</b>		<b>100</b>

**6.3** Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **70 %** and less than **50 %** on any of the individual criteria will be eliminated from further evaluation.

**6.4** Refer to Annexure A for the scoring sheet that will be used to evaluate functionality.

**6.5** The Bidder shall prepare for a possible presentation should the CSIR require such and the Bidder shall be notified thereof no later than four (4) days before the actual presentation date.

## **7 ELIMINATION CRITERIA**

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Non-attendance of compulsory briefing session;
- Incomplete proposals (Returnables not submitted); and
- Proposals submitted at incorrect location;

## **8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION**

Bidders must complete the following and include documentation with the original proposal:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: [www.csd.gov.za](http://www.csd.gov.za);
- provide the CSIR with their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process (RSA suppliers only).

## SECTION B – TERMS AND CONDITIONS

### 9 VENUE FOR PROPOSAL SUBMISSION

All proposals must be submitted at:

- **CSIR GATE 03 - Main Reception Area** (in the **Tender box**) at the following address  
Council for Scientific and Industrial Research (CSIR)  
Meiring Naudé Road  
Brummeria  
Pretoria  
South Africa

### 10 TENDER PROGRAMME

The tender program incorporates the following key dates:

- Issue of tender documents: 28 September 2018
- Compulsory Briefing session: 04 October 2018
- Closing / submission Date: 18 October 2018

## 11 SUBMISSION OF PROPOSALS

11.1 All proposals are to be sealed. No open proposals will be accepted.

11.2 All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package. Proposals must consist of two parts, each clearly marked:

**PART 1:** Technical Proposal: RFP No. 3233/18/10/2018

**PART 2:** Pricing Proposal, B-BBEE and other Mandatory Documentation:

RFP No.: 3233/18/10/2018 Proposals submitted by companies must be signed by a person or persons duly authorised.

11.3 The CSIR will award the contract to qualified tenderer(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price and B-BBEE.

## 12 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **Thursday, 18 October 2018** during CSIR's business hours. The CSIR business hours are between 08h00 and 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated place, it will be regarded as a late tender. Late tenders will not be considered.

## 13 AWARDING OF TENDERS

13.1 Awarding of tenders will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

## 14 EVALUATION PROCESS

### 14.1 Evaluation of proposals

All proposals will be evaluated by an evaluation team for functionality, price and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderer.

A two-phase evaluation process will be followed.

- The first phase includes evaluation of **elimination** and **functionality criteria**.
- The second phase includes the evaluation of **price** and **B-BBEE** status.

Pricing Proposals will only be considered after functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

#### **14.2 Preference points system**

The 80/20 preference point system will be used where 80 points will be dedicated to price and 20 points to B-BBEE status.

### **15 PRICING PROPOSAL**

**15.1** Pricing proposal must be cross-referenced to the sections in the Technical Proposal. Any options offered must be clearly labelled. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.

**15.2** Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.

**15.3** Price should include additional cost elements such as freight, insurance until acceptance at the CSIR campus in Pretoria, and duty where applicable.

**15.4** Only firm prices\* will be accepted during the tender validity period. Non-firm prices\*\* (including prices subject to rates of exchange variations) will not be considered.

*\*Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;*

*\*\*Non-firm price is all prices other than "firm" prices.*

**15.5** Payment will be according to the CSIR Payment Terms and Conditions.

## **16 VALIDITY PERIOD OF PROPOSAL**

Each **proposal** shall be valid for a minimum period of three (3) months calculated from the closing date.

## **17 APPOINTMENT OF SERVICE PROVIDER**

**17.1** The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.

**17.2** Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.

**17.3** Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

## **18 ENQUIRIES AND CONTACT WITH THE CSIR**

Any enquiry regarding this RFP shall be submitted in writing to CSIR at tender@csir.co.za with "**RFP No 3233/18/10/2018 - The provision of Real Estate Advisory Services to the CSIR**" as the subject.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

## **19 MEDIUM OF COMMUNICATION**

All documentation submitted in response to this RFP must be in English.

## **20 COST OF PROPOSAL**

Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The CSIR is not responsible directly or indirectly for any costs incurred by tenderers.

## **21 CORRECTNESS OF RESPONSES**

**21.1** The tenderer must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.

**21.2** The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

## **22 VERIFICATION OF DOCUMENTS**

**22.1** Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.

**22.1** *One hard copy and one electronic copy (CD or USB memory key)* of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.

**22.2** Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

**22.3** If a courier service company is being used for delivery of the proposal document, the RFP description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered to the tender box, by the stipulated due date.

## **23 SUB-CONTRACTING**

**23.1** A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than **25%** of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.

**23.2** A tenderer awarded a contract may not sub-contract more than **25%** of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.



## **24 TRAVEL EXPENSES**

**24.1** All travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imburements, must be in line with the CSIR's travel policy. The following will apply:

**24.1.1** Only economy class tickets will be used.

**24.1.2** A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.

**24.1.3** No car rentals of more than a Group B will be accommodated.

## **25 ADDITIONAL TERMS AND CONDITIONS**

**25.1** A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.

**25.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

**25.3** In case of proposal from a joint venture, the following must be submitted together with the proposal:

- Joint venture Agreement including split of work signed by both parties;
- The original or certified copy of the B-BBEE certificate of the joint venture;
- The Tax Clearance Certificate of each joint venture member;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificate.

**25.4** An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.

**25.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

## **26 CSIR RESERVES THE RIGHT TO**

- 26.1** Extend the closing date;
- 26.2** Verify any information contained in a proposal;
- 26.3** Request documentary proof regarding any tendering issue;
- 26.4** Give preference to locally manufactured goods;
- 26.5** Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
- 26.6** Award this RFP as a whole or in part;
- 26.7** Cancel or withdraw this RFP as a whole or in part.

## **27 DISCLAIMER**

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

**DECLARATION BY TENDERER**

**Only tenderers who completed the declaration below will be considered for evaluation.**

**RFP No: 3233/18/10/2018**

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in RFP No..... at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT) .....  
CAPACITY .....  
SIGNATURE .....  
NAME OF FIRM .....  
DATE .....

WITNESSES	
1	.....
2	.....
DATE:	

28 ANNEXURE A: Scoring sheet to be used to evaluate functionality

No	Functional Criteria	Functional Sub-Criteria	Weighting								
1	<b>EXPERIENCE OF THE BIDDER</b>	<p><b>Bidders will be evaluated on their relevant experience in completing similar projects and sectors:</b></p> <table border="1"> <tr> <td>No relevant experience or less than 3 projects</td> <td><b>0 points</b></td> </tr> <tr> <td>The bidder has completed 3 - 5 relevant and similar projects</td> <td><b>5 points</b></td> </tr> <tr> <td>The bidder has completed 6 - 8 relevant and similar projects</td> <td><b>7 points</b></td> </tr> <tr> <td>The bidder has completed more than 8 relevant and similar projects</td> <td><b>10 points</b></td> </tr> </table>	No relevant experience or less than 3 projects	<b>0 points</b>	The bidder has completed 3 - 5 relevant and similar projects	<b>5 points</b>	The bidder has completed 6 - 8 relevant and similar projects	<b>7 points</b>	The bidder has completed more than 8 relevant and similar projects	<b>10 points</b>	50
No relevant experience or less than 3 projects	<b>0 points</b>										
The bidder has completed 3 - 5 relevant and similar projects	<b>5 points</b>										
The bidder has completed 6 - 8 relevant and similar projects	<b>7 points</b>										
The bidder has completed more than 8 relevant and similar projects	<b>10 points</b>										
2	<b>REFERENCES ON PAST PROJECTS</b>	<p><b>References from clients:</b></p> <table border="1"> <tr> <td>No references / rated poorly on all projects.</td> <td><b>0 points</b></td> </tr> <tr> <td>The bidder's overall performance has been rated <b>satisfactory</b> in <b>2 – 3</b> relevant projects</td> <td><b>5 points</b></td> </tr> <tr> <td>The bidder's overall performance has been rated <b>very good</b> <b>2 – 3</b> relevant projects.</td> <td><b>7 points</b></td> </tr> <tr> <td>The bidder has performed and rated <b>exceptional in 2 – 3</b> relevant projects.</td> <td><b>10 points</b></td> </tr> </table>	No references / rated poorly on all projects.	<b>0 points</b>	The bidder's overall performance has been rated <b>satisfactory</b> in <b>2 – 3</b> relevant projects	<b>5 points</b>	The bidder's overall performance has been rated <b>very good</b> <b>2 – 3</b> relevant projects.	<b>7 points</b>	The bidder has performed and rated <b>exceptional in 2 – 3</b> relevant projects.	<b>10 points</b>	5
No references / rated poorly on all projects.	<b>0 points</b>										
The bidder's overall performance has been rated <b>satisfactory</b> in <b>2 – 3</b> relevant projects	<b>5 points</b>										
The bidder's overall performance has been rated <b>very good</b> <b>2 – 3</b> relevant projects.	<b>7 points</b>										
The bidder has performed and rated <b>exceptional in 2 – 3</b> relevant projects.	<b>10 points</b>										
3	<b>CAPACITY OF THE BIDDER TO DELIVER THE SERVICE</b>	<p><b>Bidders will be evaluated on their capacity to complete the project including staffing schedule and relevant staff experience in similar projects:</b></p> <table border="1"> <tr> <td>No relevant experience or less than 3 projects</td> <td><b>0 points</b></td> </tr> <tr> <td>The proposed staffing plan has identified key team members with extensive experience in all the fields of work with 4-8 years' experience in on-site accommodation development and transaction advisory services.</td> <td><b>5 points</b></td> </tr> <tr> <td>The staffing schedule comprises highly experienced team with over 8 years' experience in on-site accommodation development and transaction advisory services.</td> <td><b>7 points</b></td> </tr> <tr> <td>The bidder's proposed staff has completed more than 8 years' experience in on-site accommodation development and transaction advisory services, including land ground leases.</td> <td><b>10 points</b></td> </tr> </table>	No relevant experience or less than 3 projects	<b>0 points</b>	The proposed staffing plan has identified key team members with extensive experience in all the fields of work with 4-8 years' experience in on-site accommodation development and transaction advisory services.	<b>5 points</b>	The staffing schedule comprises highly experienced team with over 8 years' experience in on-site accommodation development and transaction advisory services.	<b>7 points</b>	The bidder's proposed staff has completed more than 8 years' experience in on-site accommodation development and transaction advisory services, including land ground leases.	<b>10 points</b>	20
No relevant experience or less than 3 projects	<b>0 points</b>										
The proposed staffing plan has identified key team members with extensive experience in all the fields of work with 4-8 years' experience in on-site accommodation development and transaction advisory services.	<b>5 points</b>										
The staffing schedule comprises highly experienced team with over 8 years' experience in on-site accommodation development and transaction advisory services.	<b>7 points</b>										
The bidder's proposed staff has completed more than 8 years' experience in on-site accommodation development and transaction advisory services, including land ground leases.	<b>10 points</b>										

No	Functional Criteria	Functional Sub-Criteria	Weighting								
4	<b>VALUE PROPOSITION</b>	<p><b>Bidders will be evaluated on their demonstrable understanding of the assignment and methodology as follows:</b></p> <ul style="list-style-type: none"> <li>• Technical approach and methodology</li> <li>• Outline how the bidder will ensure that the CSIR gets the best deal out of a transaction.</li> <li>• Outline the bidder’s approach include the work-plan;</li> <li>• Outline how the bidder will maintain efficient communication with the client etc.</li> <li>• Organization and staffing plan</li> <li>• Timeframe for completion of the project</li> </ul> <table border="1" data-bbox="570 545 1639 1324"> <tr> <td data-bbox="570 545 1414 609">Non-submission or proposal does not address the scope of the assignment.</td> <td data-bbox="1414 545 1639 609"><b>0 points</b></td> </tr> <tr> <td data-bbox="570 609 1414 858">Approach is generic. The bidder’s proposal addresses and meets minimum requirements. The proposed staffing plan has identified the necessary expertise and the relevant experience in all the required areas to complete the assignment. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements. The bidder has successfully completed similar projects.</td> <td data-bbox="1414 609 1639 858"><b>5 points</b></td> </tr> <tr> <td data-bbox="570 858 1414 1043">Approach is specifically tailored to suit the requirements and will meet the needs of the assignment. The bidder has adequately demonstrated how they will ensure the CSIR gets the best deal out of a transaction The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements.</td> <td data-bbox="1414 858 1639 1043"><b>7 points</b></td> </tr> <tr> <td data-bbox="570 1043 1414 1324">The approach is innovative. . The bidder has adequately demonstrated how they will ensure the CSIR gets the best deal out of a transaction. The methodology has specifically indicated methods of identification of developers and partners for the development and possible innovative areas for considerations. The bidder has included examples of past work and relevant potential partners on past experience. Clear timeliness, required information and deliverables have been highlighted. The bidder has clearly outlined the quality control procedures</td> <td data-bbox="1414 1043 1639 1324"><b>10 points</b></td> </tr> </table>	Non-submission or proposal does not address the scope of the assignment.	<b>0 points</b>	Approach is generic. The bidder’s proposal addresses and meets minimum requirements. The proposed staffing plan has identified the necessary expertise and the relevant experience in all the required areas to complete the assignment. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements. The bidder has successfully completed similar projects.	<b>5 points</b>	Approach is specifically tailored to suit the requirements and will meet the needs of the assignment. The bidder has adequately demonstrated how they will ensure the CSIR gets the best deal out of a transaction The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements.	<b>7 points</b>	The approach is innovative. . The bidder has adequately demonstrated how they will ensure the CSIR gets the best deal out of a transaction. The methodology has specifically indicated methods of identification of developers and partners for the development and possible innovative areas for considerations. The bidder has included examples of past work and relevant potential partners on past experience. Clear timeliness, required information and deliverables have been highlighted. The bidder has clearly outlined the quality control procedures	<b>10 points</b>	25
Non-submission or proposal does not address the scope of the assignment.	<b>0 points</b>										
Approach is generic. The bidder’s proposal addresses and meets minimum requirements. The proposed staffing plan has identified the necessary expertise and the relevant experience in all the required areas to complete the assignment. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements. The bidder has successfully completed similar projects.	<b>5 points</b>										
Approach is specifically tailored to suit the requirements and will meet the needs of the assignment. The bidder has adequately demonstrated how they will ensure the CSIR gets the best deal out of a transaction The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements.	<b>7 points</b>										
The approach is innovative. . The bidder has adequately demonstrated how they will ensure the CSIR gets the best deal out of a transaction. The methodology has specifically indicated methods of identification of developers and partners for the development and possible innovative areas for considerations. The bidder has included examples of past work and relevant potential partners on past experience. Clear timeliness, required information and deliverables have been highlighted. The bidder has clearly outlined the quality control procedures	<b>10 points</b>										

## 29 ANNEXURE B: BIDDER'S EXPERIENCE

The Bidder must demonstrate relevant experience and provide signed reference letters from contactable corporate clients and also populate Table 1 below.

Table 1 Bidder's experience:

Client's name	Contract period (start and end dates)	Description of service performed and extent of bidder's responsibilities	Name, title and telephone contact of client	Signed reference letter attached Indicate yes /no

Capacity of Resources and Key personnel and qualifications:

- Real estate experience professional services
- Financial modelling experience

Table 2: Staff complement

Category of Employee / Role	Name	Qualifications	Experience

Submit an organogram and Curriculum Vitae of Key Personnel for each position.

**30 ANNEXURE C: BIDDER'S PROPOSAL / VALUE PROPOSITION**



Attach additional pages if more space is required