REQUEST FOR QUOTATION

<table>
<thead>
<tr>
<th>YOU ARE HEREBY INVITED TO SUBMIT QUOTATIONS FOR THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED</th>
</tr>
</thead>
<tbody>
<tr>
<td>BID NUMBER:</td>
</tr>
<tr>
<td>RFQ ISSUE DATE:</td>
</tr>
<tr>
<td>CLOSING DATE AND TIME:</td>
</tr>
<tr>
<td>RFQ VALIDITY PERIOD</td>
</tr>
<tr>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>RESPONSES TO THIS RFQ SHOULD BE SUBMITTED BY EMAIL:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>TENDER TECHNICAL AND GENERAL QUERIES</td>
</tr>
<tr>
<td>COMPLAINTS ABOUT THIS RFQ OR TENDER PROCESS</td>
</tr>
</tbody>
</table>

Bidders must acknowledge receipt of this RFQ on the above contact details.

NB: All enquiries regarding this RFQ must be forwarded to the stated email address above within the day after the RFQ has been issued. No enquiries from bidders will be entertained after the closing date of this RFQ and during the subsequent evaluation processes. DBSA however reserves the right to clarify any information with any bidder regarding their response to this RFQ.

All responses must be submitted to the above-mentioned address at the time specified.
THE DEVELOPMENT BANK OF SOUTHERN AFRICA HAS A ZERO TOLERANCE ON FRAUD AND CORRUPTION.
REPORT ANY INCIDENTS OF FRAUD AND CORRUPTION TO WHISTLE BLOWERS ON ANY OF THE FOLLOWING:

TOLLFREE: 0800 20 49 33
EMAIL: dbsa@whistleblowing.co.za
FREE POST: FREE POST KZN 685 | Musgrave | 4062
SMS: 33490

**SUPPLIER INFORMATION**

<table>
<thead>
<tr>
<th>NAME OF BIDDER</th>
<th>POSTAL ADDRESS</th>
<th>STREET ADDRESS</th>
<th>TELEPHONE NUMBER</th>
<th>CODE</th>
<th>NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>CELLPHONE NUMBER</th>
<th>FACSIMILE NUMBER</th>
<th>CODE</th>
<th>NUMBER</th>
</tr>
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<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>E-MAIL ADDRESS</th>
<th>VAT REGISTRATION NUMBER</th>
<th>SUPPLIER COMPLIANCE STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>TAX COMPLIANCE SYSTEM PIN:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OR CENTRAL SUPPLIER DATABASE No: MAAA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ORIGINAL AND VALID B-BBEE STATUS LEVEL SWORN AFFIDAVIT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>[TICK APPLICABLE BOX] ORIGINAL B-BBEE STATUS LEVEL SWORN AFFIDAVIT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>[TICK APPLICABLE BOX] YES NO</td>
</tr>
<tr>
<td></td>
<td></td>
<td>YES NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPLIER COMPLIANCE STATUS</th>
<th>ORIGINAL AND VALID B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE OR ORIGINAL CERTIFIED COPY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[AN ORIGINAL AND VALID B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</td>
</tr>
<tr>
<td></td>
<td>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/SERVICES/WORKS OFFERED?</td>
</tr>
<tr>
<td></td>
<td>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS/SERVICES/WORKS OFFERED?</td>
</tr>
<tr>
<td></td>
<td>[IF YES ENCLOSE PROOF]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS PLEASE COMPLETE AS PER SECTION 3 OF THE TERMS AND CONDITIONS BELOW</th>
</tr>
</thead>
</table>

**NOTE:** Whether or not you are submitting a bid, please email this schedule to the Procurement Specialist.

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>We will bid:</td>
<td></td>
</tr>
</tbody>
</table>
TERMS AND CONDITIONS FOR BIDDING

1. RFQ SUBMISSION:

1.1. RFQ 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 RETYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.

1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.

1.4. 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 LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.

1.5. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

1.6. PARTICIPATION IN THE TENDER PROCESS IS SUBJECT TO COMPLIANCE WITH THE TENDER CONDITIONS CONTAINED IN THIS RFQ DOCUMENT.

1.7. THE SUCCESSFUL BIDDER MAY BE REQUIRED TO CONCLUDE A FORMAL WRITTEN CONTRACT WITH THE DBSA DEpending on the nature of the services tendered for.

1.8. IF THE BIDDER’S SUBMISSION OF A QUOTATION IS SUCCESSFUL, THE DBSA SHALL APPOINT THE BIDDER TO EXECUTE OR PROVIDE THE REQUIRED SERVICES OR GOODS. WHERE NO FORMAL WRITTEN CONTRACT IS REQUIRED TO BE CONCLUDED WITH THE SUCCESSFUL BIDDER, THE DBSA SHALL PLACE A PURCHASE ORDER WITH THE BIDDER AND THE AFORESAID GENERAL CONDITIONS OF CONTRACT SHALL APPLY TO ANY SUBSEQUENT PURCHASE ORDER. IN THE EVENT THAT A FORMAL WRITTEN CONTRACT IS REQUIRED TO BE CONCLUDED WITH THE BIDDER, THE PARTIES SHALL EXECUTE A SERVICE CONTRACT AND THEREAFTER THE DBSA SHALL PLACE A PURCHASE ORDER.

1.9. NO SERVICES MUST BE RENDERED OR GOODS DELIVERED BEFORE AN OFFICIAL DBSA APPOINTMENT LETTER HAS BEEN ISSUED, A SERVICE CONTRACT SIGNED WHERE APPLICABLE, AND A PURCHASE ORDER HAS BEEN RECEIVED BY THE SUPPLIER.

1.10. LATE AND INCOMPLETE SUBMISSIONS WILL NOT BE ACCEPTED.

1.11. ANY BIDDER WHO HAS REASONS TO BELIEVE THAT THE RFQ SPECIFICATION IS BASED ON ANY SPECIFIC BRAND MUST INFORM DBSA IN WRITING BEFORE THE RFQ CLOSING DATE. IT SHOULD HOWEVER, BE NOTED THAT DBSA RESERVES THE RIGHT TO ISSUE BRAND SPECIFIC SPECIFICATIONS “EQUIVALENT” / REQUIREMENTS TENDER.
1.12. BIDDERS ARE REQUIRED TO COMPLETE ANNEXURE B FOR ALL PRICE QUOTATIONS EXCEEDING THE VALUE OF R30 000 (VAT INCLUDED) AND ATTACH TO THE FUNCTIONAL/TECHNICAL PROPOSAL WHERE THE TENDERING PROCESS WILL USE A ONE ENVELOPE SYSTEM.

1.13. BIDDERS ARE ALSO REQUIRED TO COMPLETE AND SIGN ALL DECLARATIONS AS PART OF THE RFQ DOCUMENTATION PACK THE STANDARD BIDDING DOCUMENTS (SBD) PRESCRIBED BY THE NATIONAL TREASURY ATTACHED AS ANNEXURE C.


1.15. ALL PRICES MUST BE QUOTED IN SOUTH AFRICAN RAND (ZAR)

1.16. THE COST OF MARKETING AND ADVERTISING, AND OTHER CHARGES MUST BE INCLUDED IN THE TOTAL PRICE QUOTED, IF THESE ITEMS ARE REQUESTED AS PART OF THE DBSA COST TEMPLATE / MODEL OF THIS RFQ. BIDDERS SHOULD UNDER NO CIRCUMSTANCES INCLUDE ANY ADDITIONAL COST ELEMENTS WHICH HAVE NOT SPECIFICALLY BEEN REQUESTED FOR AS PART OF THIS RFQ. IF ADDITIONAL ITEMS ARE SUGGESTED BY ANY BIDDER, THEN THESE ITEMS MUST BE SEPARATELY SPECIFIED WITH A CLEAR MOTIVATION OF WHY THESE ADDITIONAL ITEMS MAY BE REQUIRED. IT SHOULD ALSO BE FURTHER STATED WHETHER THE WORKABILITY OF THE SOLUTION PROPOSED IS DEPENDENT ON SUCH ADDITIONAL ITEMS OR NOT.

1.17. BIDDERS ARE ALSO REQUESTED TO SEPARATELY PROVIDE A DETAILED COST BREAKDOWN OF ALL ITEMS TO BE PROVIDED AS PART OF THEIR RESPONSE TO THIS RFQ, WHICH CLEARLY DEPICTS THE ITEM DESCRIPTION (BRAND NAME, PRODUCT CODE) AND ASSOCIATED QUANTITIES. FAILURE TO PROVIDE THIS INFORMATION WILL INVALIDATE THE RFQ RESPONSE ON THE BASIS OF INCOMPLETENESS. THE TOTAL COST OF THE RFQ RESPONSE BASED ON THE DBSA COST TEMPLATE / MODEL SHOULD EXACTLY MATCH THE TOTAL COST OF THE DETAILED COST BREAKDOWN. IN THE EVENT OF ANY DISCREPANCIES, THEN THE HIGHER AMOUNT OF THE 2 DOCUMENTS WILL BE USED AS BASIS FOR THE PRICE EVALUATIONS OF THIS RFQ RESPONSE.

2. TAX COMPLIANCE REQUIREMENTS

2.1. BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2. BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER’S PROFILE AND TAX STATUS.

2.3. APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.

2.4. BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.

2.5. IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED;
Each party must submit a separate proof of TCS / 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.

3. Questionnaire to bidding foreign suppliers

3.1. Is the bidder a resident of the republic of South Africa (RSA)? □ Yes □ No

3.2. Does the bidder have a branch in the RSA? □ Yes □ No

2.8 Does the bidder have a permanent establishment in the RSA? □ Yes □ No

3.1. Does the bidder have any source of income in the RSA? □ Yes □ No

If the answer is “No” to all of the above, then, it is not a requirement to obtain a tax compliance status / tax compliance system PIN code from the South African Revenue Service (SARS) and if not register as per 2.3 above.

4. Compliance requirements

4.1 All bidder must submit their original and valid BBBEE status level verification certificate or original certified copy or original sworn affidavit thereof, substantiating their BBBEE status.

4.2 The submission of such certificates must comply with the requirements of instructions and guidelines issued by the National Treasury and must be in accordance with the applicable notices published by the Department of trade and Industry in the government gazette.

5. Pre-qualification criteria

5.1 The following pre-qualifying criteria will be applied, bidders who do not meet all of the pre-qualifying criteria will not be considered for award of the bid:

i. If the bidder itself is not an EME or QSE with a minimum B-BBEE status level 2, as per section 4(1)(a) and (b) of the Preferential Procurement Regulations (PPR) 2017, must subcontract 30% of the value of the contract to the following category referred to in section 4(1)(c) of the PPR 2017:

   ▪ An EME or QSE which at least a 51% owned by black people.

Failure to comply with this mandatory eligibility criteria will disqualify the bidder’s proposal.

6. Functional evaluation

□ Bidders must score a minimum of 70% out of a possible 100 points to be considered for price and BBBEE.

□ Technical evaluation criteria score breakdown is in the terms of reference.
7. PRICE AND PREFERENCE EVALUATION

7.1 This RFQ will be evaluated in terms of the 80/20 preference point system prescribed by the preferential procurement regulations 2017 as amended. The allocation of points will be as follows:

<table>
<thead>
<tr>
<th>Price</th>
<th>80</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEE</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>100 Points</td>
</tr>
</tbody>
</table>

8. ORAL PRESENTATIONS

8.1 Bidders who submit bids in response to this RFQ may be required to give an oral presentation, which may include, but is not limited to, a marketing proposal demonstration of their proposal to DBSA. This provides an opportunity for the bidder to clarify or elaborate on their proposal. This is a fact-finding and explanation session only and does not include negotiation. DBSA shall schedule the time and location of these presentations.

8.2 Oral presentations are an option of DBSA and may or may not be conducted. If such presentations or product demonstrations are required, then the cost to set up these sessions will be borne by the bidder. It should also be noted that where a bidder can only facilitate such presentation and demonstration sessions abroad or even beyond the provincial borders of Gauteng, then any associated subsistence and traveling cost of the DBSA bid evaluation team, will be for the account of the bidder.

9. REASONS FOR DISQUALIFICATION

9.1 DBSA reserves the right to disqualify any bidder which does any one or more of the following:

9.1.1 Bidders who submitted incomplete information and documentation according to the requirements of this RFQ;
9.1.2 Bidders who submitted information that is fraudulent, factually untrue or inaccurate, for example memberships that do not exist, BEE credentials, experience, etc.;
9.1.3 Bidders who received information not available to other vendors through fraudulent means; and/or
9.1.4 Bidders who do not comply with any other requirements as stipulated in this RFQ document.
9.1.5 Bidders who submit response after the stipulated submission date and time.

10. RIGHT TO CANCEL

10.1 DBSA reserves the right to cancel or reject any quote and not to award the RFQ to the lowest bidder or award parts of the RFQ to different bidders, or not to award the RFQ at all.
11. DECLARATION BY BIDDER

I, the undersigned (Name)…………………………………………………………………………………………………………………………………….certify that:

i. I have read, understood and unconditionally accept the conditions of this RFQ.

ii. I have supplied the required information and the information submitted as part of this RFQ is true and correct.

........................................................................................................................

SIGNATURE OF BIDDER

CAPACITY UNDER WHICH THIS BID IS SIGNED:

........................................................................................................................

(Proof of authority must be submitted e.g. company resolution)

DATE:  ..........................................................................................
TERMS OF REFERENCE

COMPILATION OF THE DBSA’S 2019/20 AND 2020/21
INTEGRATED ANNUAL REPORT

02 March 2020
Contents

CONFIDENTIALITY .........................................................................................................................

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   1.1. Introduction ............................................................................................................................

2. ORGANISATIONAL OVERVIEW ...................................................................................................
   2.1. Background ............................................................................................................................

3. OVERVIEW OF KEY REQUIREMENTS .........................................................................................
   3.1. Objectives .............................................................................................................................
   3.2. Scope of Work .......................................................................................................................  

4. REPORTS AND TIME SCHEDULE ............................................................................................... 

5. TENDER EVALUATION & ADJUDICATION CRITERIA .................................................................

6. INTELLECTUAL PROPERTY ........................................................................................................

7. ANNUAL REPORT TIMELINES ....................................................................................................

Recommendation ..............................................................................................................................
CONFIDENTIALITY

All information contained in this document is confidential and is provided to give potential service providers adequate understanding of the Development Bank of Southern Africa’s (DBSA)’s requirements. Under no circumstances should information be disclosed to any external party.
1. TERMS OF REFERENCE

1.1. Introduction

These are the official terms of reference (TORs) commissioned by the Development Bank of Southern Africa (DBSA) for the provision of professional services in compiling the 2019/2020 and 2020/21 Annual Reports (Integrated Annual Report, Sustainability Review and Annual Financial Statement) and editorial services. The DBSA Annual Reports are compiled on an annual basis in accordance with the International Financial Reporting Standards (IFRS), the requirements of Public Finance Management Act, No. 1 of 1999 (PFMA), the Companies Act of South Africa, No. 71 of 2008 (Companies Act) and Global Reporting Initiative Standards (GRI standards).

The purpose of this Request for Quotation (RFQ) is to outline the specification, selection criteria and expectations for providing assistance in the compilation of the 2019/20 and 2020/21 Annual Reports and editorial services. It is being sent to several vendors who will be invited to demonstrate their solutions to the DBSA. You are therefore advised to include as much information as you consider enough on your proposed solution, along with an overview of your implementation strategy and time frames for this assignment.

2. ORGANISATIONAL OVERVIEW

2.1. Background

The Development Bank of Southern Africa Limited (DBSA) was established in terms of the Development Bank of Southern Africa Act, No. 13 of 1997 (Amended Act No 41 of 2014). The DBSA, as a state-owned development finance institution, is recognised as a single yet critical component of the national infrastructure system with a mandate to contribute meaningfully towards national infrastructure objectives. DBSA promotes economic development and growth, human resources development, institutional capacity building and the support of development projects and programmes in the African continent.

DBSA’s value proposition lies in its mission “To advance the development impact in the region by expanding access to development finance and effectively integrating and implementing sustainable development solutions”. It provides integrated and innovative solutions across its value chain; from project planning, preparation through financing, to drive infrastructure delivery and development impact through its in- and outsourced capabilities both in South Africa and the rest of the continent. The Bank fulfils this function by acting as an agent mainly to governments, international agencies and private sector companies that do not have institutional presence in South Africa or are not able to create permanent capacity to deliver development initiatives. This is done with the intent to improve the lives of people
through the development of social infrastructure while supporting economic growth through investment in economic infrastructure and fostering regional integration.

The DBSA started the Integrated Reporting journey at the 2012/13 financial year end and strives to continuously improve on it every year while complying with changes to applicable legislation as well as leading integrated reporting practices.

3. **OVERVIEW OF KEY REQUIREMENTS**

3.1. **Objectives**

A qualified and experienced professional service provider (PSP) is required to provide assistance, including editorial services, in compiling the 2019/20 and 2020/21 DBSA Annual Reports. The professional services include:

i. Deliver content and copy of the DBSA Integrated Annual Report, Sustainability Review excluding the Annual Financial Statements;

ii. Propose improvement from the current Annual Report compiled in 2018/19;

iii. Conduct interviews with key stakeholders within and outside the organisation and propose issues that their sections should address;

iv. Ensure accuracy and consistency of facts and figures throughout;

v. Achieve uniformity of language and stylistics;

vi. Review the type setting (glossies) of the Annual Reports; and

vii. Edit and proofread the report with content ‘owners.’

3.2. **Scope of Work**

The Professional Service Provider (PSP) is required to compile the Integrated Annual Report, Sustainability Review and Annual Financial Statements and to provide editorial services throughout. The details are as follows:

i. Deliver content of the DBSA Integrated Annual Report, Sustainability Review excluding the Annual Financial Statements;
   
   o Content must be extracted from various reports provided by the organisation (i.e. Corporate Plan, Monthly/Quarterly Performance Reports)
   
   o Content about the DBSA available in the public domain

ii. Propose improvement from the report compiled in 2018/19;
   
   o Align with leading practice for layout and presentation
Benchmark reports in the industry (local and international) to identify possible areas of improvement

iii. Conduct work to ensure that the reports comply with all the standards and regulations they are supposed to comply with, namely:
   - The Development Bank of Southern Africa Act, No. 13 of 1997 (Amended Act No 41 of 2014)
   - The Companies Act, No 71 of 2008
   - Public Finance Management Act, No 1 of 1999
   - International Financial Reporting Standards
   - GRI standards
   - National Treasury Regulations
   - King IV, and
   - Other regulations and acts that are relevant to the DBSA as a Development Financial Institution

iv. Conduct interviews with key stakeholders in the organisation, and propose issues that their sections should address:
   - Chief Executive Officer
   - Chief Financial Officer
   - Frontline Group Executives

v. Accuracy and consistency of facts and figures throughout the reports
   - Consistency of the DBSA’s identified style and message throughout the report, and between the audited and non-audited sections.

vi. Typesetting (glossies) of the Annual Reports;
   - Work with designers to generate new information graphics.

vii. Edit and proofread Annual Reports with content ‘owners.
   - The PSP will edit and proof-read the reports from initial input until they are finalised.
   - The PSP will also be required to edit and proofread the type-set version (glossies) from the printers.

4. REPORTS AND TIME SCHEDULE

The service provider shall submit and present a proposal detailing the following:

i. The methodology and approach to provide professional service in compiling the integrated annual report, including editorial services; and

ii. A detailed project implementation plan with the budget. This must be in the form of a time sheet showing the list of tasks to be performed.
On signing the agreement, the service provider shall:

i. Conduct a need assessment exercise in the organisation and engage with the project leader and relevant task teams before embarking on the work; and

ii. Develop a gap analysis report which will identify what needs to be improved in the 2019/20 Annual Reports in comparison to the prior year’s report and benchmarking with peers in the industry.

5. TENDER EVALUATION & ADJUDICATION CRITERIA

<table>
<thead>
<tr>
<th>TECHNICAL EVALUATION CRITERIA</th>
<th>PROOF</th>
<th>POINTS ALLOCATED PER SECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROPOSED RESOURCE EXPERIENCE AND QUALIFICATIONS</td>
<td>Provide summary of company and/or resource profile relevant experience and CVs of the resources that will be used in this assignment.</td>
<td></td>
</tr>
<tr>
<td>• The resources must demonstrate the understanding of the financial, Acts, regulations and other disclosures relevant to the Annual Reports (Integrated Annual Report, Sustainability Review and Annual Financial Statements)</td>
<td>• CVs should demonstrate evidence and provide details of the resource’s current and relevant experience in compiling, editing, proofreading of an integrated annual report, reporting framework experience, reviewing annual financial statements and comment on the design and layout of the annual reports</td>
<td></td>
</tr>
<tr>
<td>• The resource must have compiled or was part of a team that compiled the Annual Reports</td>
<td>o Minimum of 5 years relevant experience from each resource involved on the assignment = 10 points</td>
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</tr>
<tr>
<td></td>
<td>o 6 to 10 years relevant experience from each resource involved on the assignment = 20 points</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Above 10 years relevant experience from each resource involved on the assignment = 25 points</td>
<td>25</td>
</tr>
<tr>
<td>TECHNICAL EVALUATION CRITERIA</td>
<td>PROOF</td>
<td>POINTS ALLOCATED PER SECTION</td>
</tr>
<tr>
<td>-------------------------------</td>
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<td>-----------------------------</td>
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<tr>
<td><strong>TRACK RECORD IN SIMILAR WORK</strong></td>
<td></td>
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</tr>
<tr>
<td>• Provide a list of at least three completed assignments of a similar nature.</td>
<td>o One official reference letter = 5 points</td>
<td>15</td>
</tr>
<tr>
<td>• Provide three official reference letters of similar work done in the past 12 months. These letters must be signed, dated and on the official client’s letterhead.</td>
<td>o Two official reference letters = 10 points</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Three official reference letters = 15 points</td>
<td></td>
</tr>
<tr>
<td><strong>RELEVANT EXPERIENCE IN COMPILING ANNUAL REPORTS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Provide at least 2 copies of the Annual Reports that have been compiled previously by the resource or the company.</td>
<td>o One copy of the Annual Report = 10 points</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>o Two copies of the Annual Reports = 20 points</td>
<td></td>
</tr>
<tr>
<td><strong>UNDERSTANDING OF THE BRIEF AND METHODOLOGY</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Propose improvements to the DBSA 2019 Annual Reports considering compliance to IFRS, GRI and Companies Act leading practice for layout, and presentation as well other reports developed by our peers in the industry;</td>
<td>Summary proposal of how the assignment will be conducted including the following:</td>
<td></td>
</tr>
<tr>
<td>• Propose how the editing and proofreading of Annual Reports will be done, including the process to liaise with content owners;</td>
<td>• Provide up to 10 improvements to 2019 Annual Reports = 10 points</td>
<td>40</td>
</tr>
<tr>
<td>• Propose how inputs will be provided into the type setting (glossies) of the Annual Reports and the use of designers to generate new information graphics.</td>
<td>• Editing and proofreading of Annual Reports = 5 points</td>
<td></td>
</tr>
<tr>
<td>• Provide a detailed project plan on the company plans to execute and manage this project.</td>
<td>• Inputs to glossies at the design phase = 5 points</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Detailed project plan with timelines = 20 points</td>
<td></td>
</tr>
</tbody>
</table>

| MINIMUM THRESHOLD | 70 | 100 |
6. **FUNCTIONAL EVALUATION THRESHOLD**

Bidders must score a minimum of 70% out of a possible 100 points to be considered for price and BBBEE.

7. **TECHNICAL EVALUATION OF PROPOSAL**

An adjudication panel, coordinated by the DBSA will evaluate submissions based on the following criteria:

<table>
<thead>
<tr>
<th>Area</th>
<th>Maximum Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>80</td>
</tr>
<tr>
<td>BBB-EE</td>
<td>20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

8. **ANNUAL REPORT TIMELINES**

An achievable work plan is as follows:

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>TIMING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Research into the DBSA’s operating environment and performance in</td>
<td>23 March to 03 April 2020</td>
</tr>
<tr>
<td>FY 2019, as well as that of its peers, Perform a gap analysis between</td>
<td></td>
</tr>
<tr>
<td>the DBSA 2019 Annual Reports (“as is”) and the International</td>
<td></td>
</tr>
<tr>
<td>Integrated Reporting Council’s International Integrated Reporting</td>
<td></td>
</tr>
<tr>
<td>framework (“to be”)</td>
<td></td>
</tr>
<tr>
<td>2. Compile and agree on the interview questionnaire.</td>
<td>30 March to</td>
</tr>
<tr>
<td>3. Participate in interviews with the following key figures (Chief</td>
<td>17 April 2020</td>
</tr>
<tr>
<td>Executive Officer, Chief Financial Officer and Frontline Group Executives,</td>
<td></td>
</tr>
<tr>
<td>and propose issues that their sections should address</td>
<td></td>
</tr>
<tr>
<td>4. Summary and key outcomes of the interviews</td>
<td>30 March to</td>
</tr>
<tr>
<td>5. Generate and prepare new content, as required</td>
<td>17 April 2020</td>
</tr>
<tr>
<td>6. Edit and proofread Integrated Annual Report, liaising with content</td>
<td>04 May to 12 June 2020</td>
</tr>
<tr>
<td>‘owners’</td>
<td></td>
</tr>
<tr>
<td>7. Work with designers on generating information graphics</td>
<td>04 May to 30 June 2020</td>
</tr>
</tbody>
</table>

9. **INTELLECTUAL PROPERTY**

The entire project shall be regarded as the exclusive intellectual property of the DBSA for use it places in promoting the organization’s future business interests. Lastly, the service provider undertakes to treat all work pertaining to this project with the highest degree of confidentiality for the duration of the project and afterwards.
## PRICE PROPOSAL

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>YEAR 1</th>
<th>YEAR 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL COST INC. VAT FOR 24 MONTHS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where:

- the bidder is employed by the state; and/or

- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

2.1 Full Name of bidder or his or her representative: .................................................................

2.2 Identity Number: .........................................................................................................................

2.3 Position occupied in the Company (director, trustee, shareholder²): ........................................

2.4 Company Registration Number: ................................................................................................

2.5 Tax Reference Number: ..............................................................................................................

2.6 VAT Registration Number: ..........................................................................................................  

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

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

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

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

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member: ............................................................
Name of state institution at which you or the person connected to the bidder is employed : ............................................................
Position occupied in the state institution: ................................................................................................

Any other particulars:
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................
2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? YES / NO

2.7.2.1 If yes, did you attach proof of such authority to the bid document? YES / NO

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

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

…………………………………………………………………….
…………………………………………………………………….

2.8 Did you or your spouse, or any of the company’s directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? YES / NO

2.8.1 If so, furnish particulars:

…………………………………………………………………….
…………………………………………………………………….
…………………………………………………………………….

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? YES / NO

2.9.1 If so, furnish particulars.

…………………………………………………………………….
…………………………………………………………………….
…………………………………………………………………….

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? YES/NO

2.10.1 If so, furnish particulars.

…………………………………………………………………….
…………………………………………………………………….
…………………………………………………………………….

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? YES/NO

2.11.1 If so, furnish particulars:

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

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Identity Number</th>
<th>Personal Tax Reference Number</th>
<th>State Employee Number / Pernal Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

4. DECLARATION

I, THE UNDERSIGNED (NAME)……………………………………………………………………………………………………
CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

........................................... ...............................................
Signature Date

........................................... ...............................................
Position Name of bidder

May 2011
PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

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


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 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 preference point system will be applicable to 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:

<table>
<thead>
<tr>
<th></th>
<th>POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>80</td>
</tr>
<tr>
<td>B-BBEE STATUS LEVEL OF CONTRIBUTION</td>
<td>20</td>
</tr>
<tr>
<td>Total points for Price and B-BBEE must not exceed</td>
<td>100</td>
</tr>
</tbody>
</table>

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

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

2. DEFINITIONS

(a) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
(b) “B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

(c) “bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;

(d) “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

(e) “EME” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(f) “functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.

(g) “prices” includes all applicable taxes less all unconditional discounts;

(h) “proof of B-BBEE status level of contributor” means:

1) B-BBEE Status level certificate issued by an authorized body or person;
2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
3) Any other requirement prescribed in terms of the B-BBEE Act;

(i) “QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(j) “rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

\[
P_S = \begin{cases} 80 & (1 - \frac{P_t - P_{\text{min}}}{P_{\text{min}}}) \\ 90 & (1 - \frac{P_t - P_{\text{min}}}{P_{\text{min}}}) \end{cases}
\]

Where

\[
\begin{align*}
P_s & = \text{Points scored for price of bid under consideration} \\
P_t & = \text{Price of bid under consideration} \\
P_{\text{min}} & = \text{Price of lowest acceptable bid}
\end{align*}
\]
4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

<table>
<thead>
<tr>
<th>B-BBEE Status Level of Contributor</th>
<th>Number of points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>20</td>
</tr>
<tr>
<td>2</td>
<td>18</td>
</tr>
<tr>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Non-compliant contributor</td>
<td>0</td>
</tr>
</tbody>
</table>

5. BID DECLARATION

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

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

6.1 B-BBEE Status Level of Contributor: \( \ldots = \ldots \) (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.

7. SUB-CONTRACTING

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

(Tick applicable box)

YES □ NO □

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted .

ii) The name of the sub-contractor.

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

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

(Tick applicable box)

YES □ NO □

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:
Designated Group: An EME or QSE which is at last 51% owned by:

<table>
<thead>
<tr>
<th></th>
<th>EME</th>
<th>QSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are youth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people with disabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people living in rural or underdeveloped areas or townships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooperative owned by black people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are military veterans</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OR

Any EME
Any QSE

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:……………………………………………………………………………………………………

8.2 VAT registration number:……………………………………………………………………………………………………

8.3 Company registration number:………………………………………………………………………………………………

8.4 TYPE OF COMPANY/FIRM

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

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

…………………………………………………………………………………………………………………………………………

…………………………………………………………………………………………………………………………………………

…………………………………………………………………………………………………………………………………………

8.6 COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:……………………

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

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of
the purchaser that the claims are correct;

iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –

(a) disqualify the person from the bidding process;
(b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
(d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
(e) forward the matter for criminal prosecution.

WITNESSES
1. ........................................
2. ........................................

SIGNATURE(S) OF BIDDERS(S)
DATE: ......................................
ADDRESS ...................................
........................................
........................................
ANNEXURE E

CONTRACT FORM - PURCHASE OF GOODS/WORKS

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

PART 1 (TO BE FILLED IN BY THE BIDDER)

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to (name of institution) ........................................... in accordance with the requirements and specifications stipulated in bid number................. at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.

2. The following documents shall be deemed to form and be read and construed as part of this agreement:

   (i) Bidding documents, viz
       - Invitation to bid;
       - Tax clearance certificate;
       - Pricing schedule(s);
       - Technical Specification(s);
       - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
       - Declaration of interest;
       - Declaration of bidder’s past SCM practices;
       - Certificate of Independent Bid Determination
       - Special Conditions of Contract;
   (ii) General Conditions of Contract; and
   (iii) Other (specify)

3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

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

5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.

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

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

   WITNESSES
   1 ...........................................
   2 ...........................................
   DATE: .....................................
CONTRACT FORM - PURCHASE OF GOODS/WORKS

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I………………………………………… in my capacity as……………………………………………………………………
accept your bid under reference number ………………dated……………………for the supply of goods/works
indicated hereunder and/or further specified in the annexure(s).

2. An official order indicating delivery instructions is forthcoming.

3. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of
the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

<table>
<thead>
<tr>
<th>ITEM NO.</th>
<th>PRICE (ALL APPLICABLE TAXES INCLUDED)</th>
<th>BRAND</th>
<th>DELIVERY PERIOD</th>
<th>B-BBEE STATUS LEVEL OF CONTRIBUTION</th>
<th>MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)</th>
</tr>
</thead>
</table>

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

SIGNED AT …………………………………..ON……………………………………

NAME (PRINT) …………………………………

SIGNATURE …………………………………

OFFICIAL STAMP

WITNESSES

1. …………………………………
2. …………………………………

DATE …………………………………
Annexure F

DECLARATION OF BIDDER’S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. This Standard Bidding Document must form part of all bids invited.

2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

3. The bid of any bidder may be disregarded if that bidder, or any of its directors have:
   a. abused the institution’s supply chain management system;
   b. committed fraud or any other improper conduct in relation to such system; or
   c. failed to perform on any previous contract.

4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

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

I, THE UNDERSIGNED (FULL NAME)………………………………………………
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

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

.................................................................................. ................................................
Signature                                      Date

.................................................................................. ................................................
Position                                        Name of Bidder

.................................................................................. ................................................
Position                                        Name of Bidder
CERTIFICATE OF INDEPENDENT BID DETERMINATION

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

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

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

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

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

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

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

I, the undersigned, in submitting the accompanying bid:

___________________________________

(Bid Number and Description)

in response to the invitation for the bid made by:

_______________________________________________

(Name of Institution)

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

I certify, on behalf of: ______________________________________________ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;

2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;

3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;

4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;

5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

   (a) has been requested to submit a bid in response to this bid invitation;

   (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

   (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium\(^3\) will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

   (a) prices;
   (b) geographical area where product or service will be rendered (market allocation)
   (c) methods, factors or formulas used to calculate prices;
   (d) the intention or decision to submit or not to submit, a bid;
   (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
   (f) bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

\(^3\) Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.
10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

........................................................................................................................................

Signature ............................................................................................................................ Date

........................................................................................................................................

Position ............................................................................................................................... Name of Bidder

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Annexure H

Bidders are required to include, as annexure D to their Bids, certified copies of all relevant CIPC registration documents listing all members with percentages, in the case of a close corporation.
Where Applicable, Bidders are required to include, as Annexure E to their Bids, supporting documents to their responses to the Pre-Qualifying Criteria and Evaluation Criteria.

Where the supporting document is the profile of a member of the Bidder’s proposed team, this should be indicated.
Annexure J

Tax Compliant Status and CSD Registration Requirements

All PROSPECTIVE BIDDERS MUST HAVE A TAX COMPLIANT STATUS EITHER ON THE CENTRAL SUPPLIER DATABASE (CSD) OF THE NATIONAL TREASURY OR SARS E-FILING PRIOR TO APPOINTMENT/AWARD OF THE BID.

REGISTRATION ON THE CSD SITE OF THE NATIONAL TREASURY IS A COMPULSORY REQUIREMENT FOR A BIDDER TO BE APPOINTED, TO CONDUCT BUSINESS WITH THE DBSA. THE ONUS IS ON THE SUCCESSFUL BIDDER TO REGISTER ON THE CSD SITE AND PROVIDE PROOF OF SUCH REGISTRATION PRIOR TO APPOINTMENT/AWARD OF THE BID.

CSD Registration Number: