## REQUEST FOR PROPOSALS

**YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA**

<table>
<thead>
<tr>
<th>BID NUMBER:</th>
<th>RFP 234/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COMPULSORY BRIEFING DATE</strong></td>
<td>02 DECEMBER 2020 @ 11h00 (Virtual – via Microsoft Teams)</td>
</tr>
<tr>
<td><strong>CLOSING DATE:</strong></td>
<td>17 DECEMBER 2020</td>
</tr>
<tr>
<td><strong>CLOSING TIME:</strong></td>
<td>23H55</td>
</tr>
<tr>
<td><strong>PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:</strong></td>
<td>90 days (commencing from the RFP Closing Date)</td>
</tr>
<tr>
<td><strong>DESCRIPTION OF BID:</strong></td>
<td>APPOINTMENT OF 5 PROFESSIONAL SERVICE PROVIDERS TO PROVIDE SUPPORT AND SERVICES TO THE INFRASTRUCTURE DELIVERY MANAGEMENT SYSTEM BODY OF KNOWLEDGE PROGRAMME</td>
</tr>
<tr>
<td><strong>BID DOCUMENTS ADDRESS:</strong></td>
<td>Submit via Microsoft One Drive as per Link provided – see pg. 4 for detail</td>
</tr>
<tr>
<td><strong>NAME OF BIDDER:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>CONTACT PERSON:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>EMAIL ADDRESS:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TELEPHONE NUMBER:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>FAX NUMBER:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>BIDDER’S STAMP OR SIGNATURE</strong></td>
<td></td>
</tr>
</tbody>
</table>
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Part A: Invitation to Bid</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part B: Checklist of Compulsory Returnable Schedules and Documents</td>
<td>6</td>
</tr>
<tr>
<td>Part C: Specifications, Conditions of tender and Undertakings by Bidder</td>
<td>7</td>
</tr>
<tr>
<td>Part D: Terms of Reference</td>
<td>31</td>
</tr>
<tr>
<td>Annexure A</td>
<td>31</td>
</tr>
<tr>
<td>Annexure B</td>
<td>51</td>
</tr>
<tr>
<td>Annexure C</td>
<td>53</td>
</tr>
<tr>
<td>Annexure D</td>
<td>54</td>
</tr>
<tr>
<td>Annexure E</td>
<td>58</td>
</tr>
<tr>
<td>Annexure F</td>
<td></td>
</tr>
<tr>
<td>Annexure G</td>
<td>65</td>
</tr>
<tr>
<td>Annexure H</td>
<td>53</td>
</tr>
<tr>
<td>Annexure I</td>
<td>54</td>
</tr>
<tr>
<td>Annexure J/A</td>
<td>55</td>
</tr>
<tr>
<td>Annexure K</td>
<td>72</td>
</tr>
<tr>
<td>Annexure L</td>
<td>57</td>
</tr>
<tr>
<td>Annexure M</td>
<td>58</td>
</tr>
</tbody>
</table>
PART A: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF DEVELOPMENT BANK OF SOUTHERN AFRICA ("DBSA")

DESCRIPTION: RFP234/2020 -
APPOINTMENT OF 5 PROFESSIONAL SERVICE PROVIDERS TO PROVIDE SUPPORT AND SERVICES TO THE INFRASTRUCTURE DELIVERY MANAGEMENT SYSTEM BODY OF KNOWLEDGE PROGRAMME

<table>
<thead>
<tr>
<th>No</th>
<th>Description</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Advertisement of the Tender</td>
<td>18 November 2020</td>
</tr>
<tr>
<td>2</td>
<td>There will be a Compulsory Briefing Session</td>
<td>02 December 2020</td>
</tr>
<tr>
<td>3</td>
<td>Bidders to submit written questions/ clarifications.</td>
<td>14 December 2020</td>
</tr>
<tr>
<td></td>
<td>• Each bidder is encouraged to submit <strong>one (01) consolidated</strong> questions/</td>
<td></td>
</tr>
<tr>
<td></td>
<td>clarifications <strong>email</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>No</strong> questions will be entertained post the stipulated date.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DBSA to respond to written questions/ clarifications posed by bidders not</td>
<td>14 December 2020</td>
</tr>
<tr>
<td></td>
<td>prior to this date.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Such response will be provided to all invited tenderers.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Tenders <strong>Closing Date and Time</strong></td>
<td>17 December 2020 @23:55</td>
</tr>
</tbody>
</table>
INSTRUCTIONS FOR TENDER BRIEF:

➢ Bidders are required to issue Notice of Attendance by no later than 12h00 one day before scheduled Tender Brief, to nomascm@dbsa.org ONLY.
➢ Notice of Attendance must specify the relevant tender number of this specific tender (RFP234/2020).
➢ Bidders will thereafter receive an invite via email to attend the Online Brief, via Microsoft Teams.
➢ Notice of Attendance received late will not be accepted or responded to and the bidder will not be able to attend the Brief.

Instructions for TENDER SUBMISSION:

➢ Bidders are required to request for a tender submission link to nomascm@dbsa.org ONLY, as soon as bidders are ready to submit.
➢ Bidders are to ensure the documents being loaded are correct and accurate, as once they are loaded, they cannot be accessed again or deleted.
➢ If incorrect documents are loaded, the new document loaded must include the wording “Corrected”.

➢ Only Files can be loaded, not folders. As such, Folders with all its required content should be created on the Bidders computer, then be converted to either a Compressed or Zipped Folder. In a case where it is a two-envelope submission, PLEASE SEPARATE FOLDERS (PRICE & TECHNICAL)
➢ This will allow Bidders to load the whole Compressed/ Zipped Folder as a file to the Tender Submission Link.
➢ Once documents have been loaded, the Bidder will thereafter receive a confirmation email of the upload.
➢ Uploading of submission must be in the structure and order as prescribed in this tender.

THE SUCCESSFUL BIDDER WILL BE REQUIRED TO CONCLUDE A SERVICE LEVEL AGREEMENT WITH THE DBSA

BIDDERS SHOULD ENSURE THAT BIDS ARE LOADED ON THE ONE DRIVE TIMEOUSLY AS REFLECTED ON THE COVER PAGE OF THIS DOCUMENT.

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)

THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT, WHICH ARE SET OUT IN PART C OF THIS DOCUMENT.

THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED).
Bidders that are unincorporated consortia consisting of more than one legal entity must select a lead entity and furnish the details of the lead entity, unless otherwise specified.

| Name of Bidder and Each Entity in Consortium: |  |
| Postal Address: |  |
| Street Address: |  |
| Contact Person (Full Name): |  |
| Email Address: |  |
| Telephone Number: |  |
| Fax Number: |  |
| Bidder Registration Number or Registration Number of Each Entity in Consortium |  |
| Bidder VAT Registration Number or VAT Registration Number of Each Entity in Consortium |  |
| Tax Clearance Certificate Submitted? | Yes | No |
| BBBEE Certificate Submitted? | Yes | No |
| Registered with the National Treasury Central Supplier Database (CSD) | Yes | No |
| Full Name of Authorised Representative: |  |
| Capacity in Which Authorised Representative Signs: |  |
| Signature of Authorised Representative: |  |
| Date of Signature |  |
PART B: CHECKLIST OF COMPULSORY RETURNABLE SCHEDULES AND DOCUMENTS

Please adhere to the following instructions

- Tick in the relevant block below
- Ensure that the following documents are completed and signed where applicable:
- Use the prescribed sequence in attaching the annexes that complete the Bid Document

NB: Should all of these documents not be included, the Bidder may be disqualified on the basis of non-compliance

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Documents submitted as 2 -separate envelopes - for Qualifying Criteria and Functional Evaluation as Envelope 1, and all Price related documents as Envelope 2.</td>
<td></td>
</tr>
<tr>
<td>Part A: Invitation to Bid</td>
<td>Part B: Checklist of Compulsory Returnable Schedules and Documents</td>
</tr>
<tr>
<td>Part C: Specifications, Conditions of tender and Undertakings by Bidder</td>
<td>Part D: Terms of Reference</td>
</tr>
<tr>
<td>Annexure A: Price Proposal</td>
<td>Annexure B: Technical Proposal</td>
</tr>
<tr>
<td>Annexure C: SBD2 - Tax Clearance Certificate Requirement</td>
<td>Annexure D: Declaration of Interest</td>
</tr>
<tr>
<td>Annexure E: SBD6.1 and B-BBEE status level certificate</td>
<td>Annexure F: SBD8: Declaration of Bidder’s Past Supply Chain Practices</td>
</tr>
<tr>
<td>Annexure G: SBD9: Certificate of Independent Bid Determination</td>
<td>Annexure H: Certified copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation</td>
</tr>
<tr>
<td>Annexure I: Certified copies of latest share certificates, in case of a company.</td>
<td>Annexure J/A (if applicable): A breakdown of how fees and work will be spread between members of the bidding consortium.</td>
</tr>
<tr>
<td>Annexure K: Supporting documents to responses to Qualification Criteria and Evaluation Criteria.</td>
<td>Annexure L: General Condition of Contract</td>
</tr>
<tr>
<td>Annexure M: Supporting documents - CSD Registration Summary Report</td>
<td></td>
</tr>
</tbody>
</table>

Annexure L: General Condition of Contract
PART C: SPECIFICATIONS, CONDITIONS OF TENDER AND UNDERTAKINGS BY BIDDER

1. DEFINITIONS

In this Request for Proposals, unless a contrary intention is apparent:

1.1 B-BBEE means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act, 2003;

1.2 B-BBEE Act means the Broad-Based Black Economic Empowerment Act, 2003;

1.3 B-BBEE status level means the B-BBEE status received by a measured entity based on its overall performance used to claim points in terms of regulation 5 and 6 of the Preferential Procurement Regulations, 2011.

1.4 Business Day means a day which is not a Saturday, Sunday or public holiday.

1.5 Bid means a written offer in the prescribed or stipulated form lodged by a Bidder in response to an invitation in this Request for Proposal, containing an offer to provide goods, works or services in accordance with the Specification as provided in this RFP.

1.6 Bidder means a person or legal entity, or an unincorporated group of persons or legal entities that submit a Bid.

1.7 Companies Act means the Companies Act, 2008.

1.8 Compulsory Documents means the list of compulsory schedules and documents set out in Part B.

1.9 Closing Time means the time, specified as such under the clause (d Timetable) in Part C, by which Tenders must be received.

1.10 DBSA means the Development Bank of Southern Africa.

1.11 DFI means development finance institution.

1.12 Evaluation Criteria means the criteria set out under the clause 26 (Evaluation Process) of this Part C, which includes the Qualifying Criteria, Functional Criteria and Price and Preferential Points Assessment.

1.13 Functional Criteria means the criteria set out in clause 26.4 of this Part C.

1.14 Intellectual Property Rights includes copyright and neighbouring rights, and all proprietary rights in relation to inventions (including patents) registered and unregistered trademarks (including service marks), registered designs, confidential information (including trade secrets and know how) and circuit layouts, and all other proprietary rights resulting from intellectual activity in the industrial, scientific, literary or artistic fields.

1.15 PFMA means the Public Finance Management Act, 1999.


1.17 PPPFA Regulations means the Preferential Procurement Regulations 2011, as amended in 2017 published in terms of the PPPFA.
1.18 **Price and Preferential Points Assessment** means the process described in clause 26.5 of this Part C, as prescribed by the PPPFA.

1.19 **Proposed Contract** means the agreement including any other terms and conditions contained in or referred to in this RFP that may be executed between the DBSA and the successful Bidder.

1.20 **Qualifying Criteria** means the criteria set out in clause of this Part C.

1.21 **Request for Proposal** or RFP means this document (comprising each of the parts identified under Part A, Part B, Part C and Part D) including all annexures and any other documents so designated by the DBSA.

1.22 **SARS** means the South African Revenue Service.

1.23 **Services** means the services required by the DBSA, as specified in this RFP Part D.

1.24 **SLA** means service level agreement.

1.25 **SOE** means State Owned Enterprise, as defined by the Companies’ Act.

1.26 **Specification** means the conditions of tender set and any specification or description of the DBSA’s requirements contained in this RFP.

1.27 **State** means the Republic of South Africa.

1.28 **Statement of Compliance** means the statement forming part of a Tender indicating the Bidders compliance with the Specification.

1.29 **Tender Manager** means the person so designated under clause 3 (Tender Manager) of this RFP Part C.

1.30 **Tendering Process** means the process commenced by the issuing of this Request for Proposals and concluding upon formal announcement by the DBSA of the selection of a successful Bidder(s) or upon the earlier termination of the process.

1.31 **Website** means a website administered by DBSA under its name with web address [www.dbsa.org](http://www.dbsa.org)

2. **INTERPRETATIONS**

   In this RFP, unless expressly provided otherwise a reference to:

2.1 “includes” or “including” means includes or including without limitation; and

2.2 “R” or “Rand” is a reference to the lawful currency of the Republic of South Africa.

3. **TENDER MANAGER**

   The Tender Manager is:

   **Noma Rakoma**

   DBSA Supply Chain Unit

   **Email:** nomascm@dbsa.org

   No questions will be answered telephonically.
4. SUBMISSION OF TENDERS

4.1 No Hardcopies of Tenders are to be submitted
Online Submissions ONLY & adherence in submitting tender on a Two-Envelope folder (Technical Proposal & Price to be submitted in different folders – compressed – see page 4 for detail.)

4.2 Bidders are to provide 2 Folders (1) Technical proposal and (2) Pricing proposal only – see page 4 for detail.

4.3 Note: This Tendering Process will use a two-envelope system i.e. Bidders must submit the Qualifying Criteria and functional proposal in one folder and pricing and preference points proposals in a separate folder BOTH FOLDERS MUST BE CLEARLY MARKED. Should you fail to adhere to this, the bidders will be disqualified.

5. RULES GOVERNING THIS RFP AND THE TENDERING PROCESS

5.1 Participation in the tender process is subject to compliance with the rules contained in this RFP Part C.

5.2 All persons (whether or not a participant in this tender process) having obtained or received this RFP may only use it, and the information contained herein, in compliance with the rules contained in this RFP.

5.3 All Bidders are deemed to accept the rules contained in this RFP Part C.

5.4 The rules contained in this RFP Part C apply to:

5.4.1 The RFP and any other information given, received or made available in connection with this RFP, and any revisions or annexure;

5.4.2 the Tendering Process; and

5.4.3 any communications (including any briefings, presentations, meetings and negotiations) relating to the RFP or the Tendering Process.

6. STATUS OF REQUEST FOR PROPOSAL

6.1 This RFP is an invitation for companies to submit a proposal(s) for the provision of the services as set out in the Specification contained in this RFP. Accordingly, this RFP must not be construed, interpreted, or relied upon, whether expressly or implicitly, as an offer capable of acceptance by any person(s), or as creating any form of contractual, promissory or other rights. No binding contract or other understanding for the supply of services will exist between the DBSA and any Bidder unless and until the DBSA has executed a formal written contract with the successful Bidder.
7. **ACCURACY OF REQUEST FOR PROPOSAL**

7.1 Whilst all due care has been taken in connection with the preparation of this RFP, the DBSA makes no representations or warranties that the content in this RFP or any information communicated to or provided to Bidders during the Tendering Process is, or will be, accurate, current or complete. The DBSA, and its officers, employees and advisors will not be liable with respect to any information communicated which is not accurate, current or complete.

7.2 If a Bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA (other than minor clerical matters), the Bidder must promptly notify the DBSA in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the DBSA an opportunity to consider what corrective action is necessary (if any).

7.3 Any actual discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA will, if possible, be corrected and provided to all Bidders without attribution to the Bidder who provided the written notice.

8. **ADDITIONS AND AMENDMENTS TO THE RFP**

8.1 The DBSA reserves the right to change any information in, or to issue any addendum to this RFP before the Closing Time. The DBSA and its officers, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right.

8.2 If the DBSA exercises its right to change information in terms of clause 9.1, it may seek amended Tenders from all Bidders.

9. **REPRESENTATIONS**

No representations made by or on behalf of the DBSA in relation to this RFP will be binding on the DBSA unless that representation is expressly incorporated into the contract ultimately entered into between the DBSA and the successful Bidder.

10. **CONFIDENTIALITY**

10.1 All persons (including all Bidders) obtaining or receiving this RFP and any other information in connection with this RFP or the Tendering Process must keep the contents of the RFP and other such information confidential, and not disclose or use the information except as required for the purpose of developing a proposal in response to this RFP.
11. REQUESTS FOR CLARIFICATION OR FURTHER INFORMATION

11.1 All communications relating to this RFP and the Tendering Process must be directed to the Tender Manager.

11.2 All questions or requests for further information or clarification of this RFP or any other document issued in connection with the Tendering Process must be submitted to the Tender Manager by e-mail.

11.3 Any communication by a Bidder to the DBSA will be effective upon receipt by the Tender Manager (provided such communication is in the required format).

11.4 The DBSA has restricted the period during which it will accept questions or requests for further information or clarification and reserves the right not to respond to any enquiry or request, irrespective of when such enquiry or request is received.

11.5 Except where the DBSA is of the opinion that issues raised apply only to an individual Bidder, questions submitted and answers provided will be made available to all Bidders by e-mail, as well as on the DBSA’s website without identifying the person or organisation which submitted the question.

11.6 In all other instances, the DBSA may directly provide any written notification or response to a Bidder by email to the address of the Bidder (as notified by the Bidder to the Tender Manager).

11.7 A Bidder may, by notifying the Tender Manager in writing, withdraw a question submitted in accordance with clause 12, in circumstances where the Bidder does not wish the DBSA to publish its response to the question to all Bidders.

12. UNAUTHORISED COMMUNICATIONS

12.1 Communications (including promotional or advertising activities) with staff of the DBSA or their advisors assisting with the Tendering Process are not permitted during the Tendering Process, or otherwise with the prior consent of the Tender Manager. Nothing in this clause 12 is intended to prevent communications with staff of, or advisors to, the DBSA to the extent that such communications do not relate to this RFP or the Tendering Process.

12.2 Bidders must not otherwise engage in any activities that may be perceived as, or that may have the effect of, influencing the outcomes of the Tendering Process in any way.

13. IMPROPER ASSISTANCE, FRAUD AND CORRUPTION

13.1 Bidders may not seek or obtain the assistance of employees of the DBSA in the preparation of their tender responses.

13.2 The DBSA may in its absolute discretion, immediately disqualify a Bidder that it believes has sought or obtained such improper assistance.

13.3 Bidders are to be familiar with the implications of contravening the Prevention and Combating of Corrupt Activities Act, 2004 and any other relevant legislation.
14. ANTI-COMPETITIVE CONDUCT

14.1 Bidders and their respective officers, employees, agents and advisors must not engage in any collusion, anti-competitive conduct or any other similar conduct in respect of this Tendering Process with any other Bidder or any other person(s) in relation to:

14.1.1 the preparation or lodgement of their Bid
14.1.2 the evaluation and clarification of their Bid; and
14.1.3 the conduct of negotiations with the DBSA.

14.2 For the purposes of this clause 14, collusion, anti-competitive conduct or any other similar conduct may include disclosure, exchange and clarification of information whether or not such information is confidential to the DBSA or any other Bidder or any other person or organisation.

14.3 In addition to any other remedies available to it under law or contract, the DBSA may, in its absolute discretion, immediately disqualify a Bidder that it believes has engaged in any collusive, anti-competitive conduct or any other similar conduct during or before the Tendering Process.

15. COMPLAINTS ABOUT THE TENDERING PROCESS

15.1 Any complaint about the RFP or the Tendering Process must be submitted to the Tender Manager in writing, by email, immediately upon the cause of the complaint arising or becoming known to the Bidder.

15.2 The written complaint must set out:

15.2.1 the basis for the complaint, specifying the issues involved;
15.2.2 how the subject of the complaint affects the organisation or person making the complaint;
15.2.3 any relevant background information; and
15.2.4 the outcome desired by the person or organisation making the complaint.

15.3 If the matter relates to the conduct of an employee of the DBSA, the complaint should be addressed in writing marked for the attention of the Chief Executive Officer of the DBSA, and delivered to the physical address of the DBSA, as notified.

16. CONFLICT OF INTEREST

16.1 A Bidder must not, and must ensure that its officers, employees, agents and advisors do not place themselves in a position that may give rise to actual, potential or perceived conflict of interest between the interests of the DBSA and the Bidder’s interests during the Tender Process.

16.2 The Bidder is required to provide details of any interests, relationships or clients which may or do give rise to a conflict of interest in relation to the supply of the services under any contract that may result...
from this RFP. If the Bidder submits its Bid and a subsequent conflict of interest arises, or is likely to arise, which was not disclosed in the Bid, the Bidder must notify the DBSA immediately in writing of that conflict.

16.3 The DBSA may immediately disqualify a Bidder from the Tendering Process if the Bidder fails to notify the DBSA of the conflict as required.

17. **LATE BIDS**

17.1 Bids must be loaded on one drive before the Closing Time. The Closing Time may be extended by the DBSA in its absolute discretion by providing written notice to Bidders.

17.2 Bids loaded after the Closing Time or lodged at a location or in a manner that is contrary to that specified in this RFP will be disqualified from the Tendering Process and will be ineligible for consideration. However, a late Bid may be accepted where the Bidder can clearly demonstrate (to the satisfaction of the DBSA, in its sole discretion) that late lodgement of the Bid was caused by the DBSA; that access was denied or hindered in relation to the physical tender box; or that a major/critical incident hindered the delivery of the Bid and, in all cases, that the integrity of the Tendering Process will not be compromised by accepting a Bid after the Closing Time.

17.3 The determination of the DBSA as to the actual time that a Bid is lodged is final. Subject to clause 17.2, all Bids lodged after the Closing Time will be recorded by the DBSA and will only be opened for the purposes of identifying a business name and address of the Bidder. The DBSA will inform a Bidder whose Bid was lodged after the Closing Time of its ineligibility for consideration. The general operating practice is for the late Bid to be returned within 5 (five) working days of receipt or within 5 (five) working days after determination not to accept a late Bid.

18. **BIDDER’S RESPONSIBILITIES**

18.1 Bidders are responsible for:

18.1.1 examining this RFP and any documents referenced or attached to this RFP and any other information made or to be made available by the DBSA to Bidders in connection with this RFP;

18.1.2 fully informing themselves in relation to all matters arising from this RFP, including all matters regarding the DBSA’s requirements for the provision of the Services;

18.1.3 ensuring that their Bids are accurate and complete;

18.1.4 making their own enquiries and assessing all risks regarding this RFP, and fully considering and incorporating the impact of any known and unknown risks into their Bid;
18.1.5 ensuring that they comply with all applicable laws in regards to the Tendering Process particularly as specified by National Treasury Regulations, Guidelines, Instruction Notes and Practice Notes and other relevant legislation as published from time to time in the Government Gazette; and

18.1.6 submitting all Compulsory Documents.

18.2 Bidders with annual total revenue of R10 million or less qualify as Exempted Micro Enterprises (EMEs) in terms of the B-BBEE Act must submit a certificate issued by a registered, independent auditor (who or which is not the Bidder or a part of the Bidder) or an accredited verification agency.

18.3 Bidders other than Exempted Micro-Enterprises (EMEs) must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE status. The submission of such certificates must comply with the requirements of instructions and guidelines issued by National Treasury and be in accordance with the applicable notices published by the Department of Trade and Industry in the Government Gazette.

18.4 The DBSA 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 DBSA.

18.5 Failure to provide the required information may result in disqualification of the Bidder.

19. PREPARATION OF BIDS

19.1 Bidders must ensure that:

19.1.1 their Bid is submitted in the required format as stipulated in this RFP; and

19.1.2 all the required information fields in the Bid are completed in full and contain the information requested by the DBSA.

19.2 The DBSA may in its absolute discretion reject a Bid that does not include the information requested or is not in the format required.

19.3 Unnecessarily elaborate responses or other representations beyond that which is sufficient to present a complete and effective tender proposal are not desired or required. Elaborate and expensive visual and other presentation aids are not necessary.

19.4 Where the Bidder is unwilling to accept a specified condition, the non-acceptance must be clearly and expressly stated. Prominence must be given to the statement detailing the non-acceptance. It is not sufficient that the statement appears only as part of an attachment to the Bid or be included in a general statement of the Bidders usual operating conditions.

19.5 An incomplete Bid may be disqualified or assessed solely on the information completed or received with the Bid.
20. **ILLEGIBLE CONTENT, ALTERATION AND ERASURES**

20.1 Incomplete Bids may be disqualified or evaluated solely on information contained in the Bid.

20.2 The DBSA may disregard any content in a Tender that is illegible and will be under no obligation whatsoever to seek clarification from the Bidder.

20.3 The DBSA may permit a Bidder to correct an unintentional error in its Bid where that error becomes known or apparent after the Closing Time, but in no event will any correction be permitted if the DBSA reasonably considers that the correction would materially alter the substance of the Bid or effect the fairness of the Tendering Process.

21. **OBLIGATION TO NOTIFY ERRORS**

If, after a Bidder’s Response has been submitted, the Bidder becomes aware of an error in the Bidders Response (including an error in pricing but excluding clerical errors which would have no bearing on the evaluation of the Bid), the Bidder must promptly notify the DBSA of such error.

22. **RESPONSIBILITY FOR BIDDING COSTS**

22.1 The Bidders participation or involvement in any stage of the Tendering Process is at the Bidders sole risk, cost and expense. The DBSA will not be held responsible for, or pay for, any expense or loss that may be incurred by Bidders in relation to the preparation or lodgement of their Bid.

22.2 The DBSA is not liable to the Bidder for any costs on the basis of any contractual, promissory or restitutionary grounds whatsoever as a consequence of any matter relating to the Bidders participation in the Tendering Process, including without limitation, instances where:

- 22.2.1 the Bidder is not engaged to perform under any contract; or
- 22.2.2 the DBSA exercises any right under this RFP or at law.

23. **DISCLOSURE OF BID CONTENTS AND BID INFORMATION**

23.1 All Bids received by the DBSA will be treated as confidential. The DBSA will not disclose contents of any Bid and Bid information, except:

- 23.1.1 as required by law;
- 23.1.2 for the purpose of investigations by other government authorities having relevant jurisdiction;
- 23.1.3 to external consultants and advisors of the DBSA engaged to assist with the Tendering Process; or for the general information of Bidders required to be disclosed as per National Treasury Regulations, Guidelines, Instruction Notes or Practice Notes.
24. **USE OF BIDS**

24.1 Upon submission in accordance with the requirements relating to the submission of Bids, all Bids submitted become the property of the DBSA. Bidders will retain all ownership rights in any intellectual property contained in the Bids.

24.2 Each Bidder, by submission of their Bid, is deemed to have licensed the DBSA to reproduce the whole, or any portion, of their Bid for the sole purposes of enabling the DBSA to evaluate the Bid.

25. **BID ACCEPTANCE**

All Bids received must remain open for acceptance for a minimum period of 90 (Ninety) days from the Closing Time. This period may be extended by written mutual agreement between the DBSA and the Bidder.

26. **EVALUATION PROCESS**

26.1 The Bids will be evaluated and adjudicated as follows:

26.1.1 **First stage – Responsiveness Evaluation - compliance criteria**

Only those Bidders which satisfy the compliance criteria will be eligible to participate in the Tendering Process further. Bids which do not satisfy all of the compliance criteria will not be evaluated further.

26.1.2 **Second stage – Functional evaluation**

Bidders are evaluated based on the functional criteria set out in this RFP. Only those Bidders which score 70 points or higher (out of a possible 100) during the functional evaluation will be evaluated during the second stage of the Bid.

26.1.3 **Third stage – Price and Preferential Evaluation**

26.1.3.1 Those Bidders which have passed the above stages of the tender process will be scored on the basis of price and preference point allocation in accordance with the applicable legislation.

26.1.3.2 The successful Bidder will be the Bidder that scores the highest number of points in the 3rd (third) stage of the Bid evaluation, unless the DBSA exercises its right to cancel the RFP.

26.2 **NB:** Bidders are required to submit, as Annexure K to their Bids, any documentation which supports the responses provided in respect of the Qualifying Criteria and Functional Criteria below.
26.3 **First Stage: Responsiveness Evaluation**

A. Tenderers who do not adhere to the criteria listed as PRE-QUALIFIER, will be **disqualified immediately**:

<table>
<thead>
<tr>
<th>RESPONSIVENESS CRITERIA</th>
<th>PREQUALIFYING CRITERIA</th>
<th>APPLICABLE TO THIS TENDER (Y/N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adherence in submitting Tender as two envelopes (Functionality &amp; Price in the case of Functionality requirement)</td>
<td>Pre-Qualifier</td>
<td>Y</td>
</tr>
<tr>
<td>Attendance register for Compulsory Online Briefing session.</td>
<td>Pre-Qualifier</td>
<td>Y</td>
</tr>
</tbody>
</table>

B. Tenderers who do not adhere to the response time indicated for clarification inquiries by the Employer will be deemed non-responsive and not be evaluated further:

<table>
<thead>
<tr>
<th>RESPONSIVENESS CRITERIA</th>
<th>CLARIFICATION TIME</th>
<th>APPLICABLE TO THIS TENDER (Y/N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard conditions of tender as required.</td>
<td>48 hours</td>
<td>Y</td>
</tr>
<tr>
<td>Returnable documents completed and signed.</td>
<td>48 hours</td>
<td>Y</td>
</tr>
<tr>
<td>Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be fully registered &amp; compliant in order to do business with the DBSA.</td>
<td>7 days</td>
<td>Y</td>
</tr>
<tr>
<td>A valid and active Tax Compliance Status Pin issued by SARS.</td>
<td>48 hours</td>
<td>Y</td>
</tr>
<tr>
<td>Valid original/ certified letter of good standing (COIDA).</td>
<td>48 hours</td>
<td>Y</td>
</tr>
</tbody>
</table>

26.4 **Second Stage: Functional Criteria**

The professional team should have the relevant practical understanding of government protocol and demonstrated working knowledge in:

_Urban development_ issues, and adequate _project management_ for successful project completion within a public environment This should include examples of previously completed relevant assignments of the Team Experience Matrix template to be provided in the bidders’ submission pack.

**Submission Requirements**

PSPs when submitting their proposals must observe the following minimum requirements:

1. Curriculum Vitae of identified resources;
2. Relevant contactable referees must accompany work experience referenced on the Curriculum Vitae;
3. Submissions must include qualifications of the identified resources;
4. PSPs are only allowed to apply for a maximum of two (2) positions only and may only submit a maximum of one (1) Curriculum Vitae per position;

5. (Submissions that do not meet these minimum requirements will be disqualified without being assessed.

6. Bidders must indicate clearly the services they are bidding for (Maximum of 2)

Evaluation processes and methodology

- The evaluation process will be conducted at two levels, technical and financial. For the technical evaluation, proposals must meet a minimum score of 70 out of 100.
- Any proposal not meeting the minimum score of seventy points on the technical evaluation will be deemed non-responsive and will not proceed to be evaluated for price.

26.4.1 The Functional Criteria that will be used to test the capability of Bidders are as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Functionality Criteria</th>
<th>Points (Maximum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>TRACK RECORD AND EXPERIENCE IN SIMILAR WORK AND DEMONSTRATED PRACTICAL KNOWLEDGE:</td>
<td>45</td>
</tr>
<tr>
<td>2.</td>
<td>QUALIFICATIONS</td>
<td>20</td>
</tr>
<tr>
<td>3.</td>
<td>APPROACH AND UNDERSTANDING OF THE BRIEF.</td>
<td>35</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>

26.5 Third Stage: Price and Preferential Points Assessment

26.5.1 Subsequent to the evaluation of Qualifying Criteria and functional criteria, the third stage of evaluation of the Bids will be in respect of price and preferential procurement only. Points will be allocated to Bidders at this stage of the evaluation in accordance with the PPPFA and the PPPFA Regulations, as follows:

- Price points 80
- Preferential procurement points 20

26.5.2 Price points

The following formula will be used to calculate the points for price:

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

Where:

\[ P_s = \text{Points scored for comparative price of tender or offer under consideration;} \]
Pt = Comparative price of tender or offer under consideration; and
Pmin = Comparative price of lowest acceptable tender or offer.

26.5.3 Preferential procurement points
A maximum of 20 points may be awarded in respect of preferential procurement, which points must be awarded to a tenderer for attaining their B-BBEE Status Level in accordance with the table below:

<table>
<thead>
<tr>
<th>B-BBEE Status Level</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>

An unincorporated trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate Bid.

26.5.4 Total
The total points scored by each Bidder will be calculated by adding the points scored for price (out of 80) to the points scored for preferential procurement (out of 20).

The successful Bidder will be the Bidder which has the highest total points (out of 100) for both price and preferential procurement (unless there is a basis for selecting a different successful Bidder in accordance with section 2(1)(f) of the PPPFA).

26.6 Fourth Stage: Risk Analysis & Other Objective Criteria
a) Firstly, in addition to the financial offer and preference evaluation, the Tenderers having the highest ranking / number of points, will additionally be reviewed against the following points listed as “Other Objective Criteria” in terms of the PPPFA Regulations of 2017, in order to ascertain suitability for award.

i) If having passed Responsiveness, the tenderer will again be checked in terms of having a Compliant Tax Status at time of recommendation to confirm that the status has not changed, based on an active and Tax Complaint Pin issued by the South African Revenue Services.

ii) Fully compliant and registered with the National Treasury Central Supplier Database.

iii) No misrepresentation in the tender information submitted.

iv) Any non-performance on DBSA, or DBSA client projects.
v) The tenderer or any of its directors/shareholders is not listed on the Register of Tender Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business with the public sector; and

vi) The tenderer has completed the Compulsory Enterprise Questionnaire and there are no conflicts of interest which may impact on the tenderer’s ability to perform the contract in the best interests of the employer or potentially compromise the tender process and persons in the employ of the state are permitted to submit tenders or participate in the contract.

vii) Convicted by a court of law for fraud and corruption

viii) Removed from a contract between them and any organ of state on account of failure to perform on or comply with the contract.

ix) Financial health of the bidder may be assessed if deemed necessary, to ensure that the service provider will be able to operate as per required deliverables (Ratios: Accounts Receivable & Payable Turnover, Liquidity & Solvency).

x) Unduly high or unduly low Tendered rates in the Tender offer. In this regard, a financial risk analysis will be performed to verify that the costs are reasonable and balanced. Tenders may be disqualified if tendered rates are found to be distorted.

xi) In terms of unduly high Tendered fees in the Tender offer, refer to the PPR2017.

xii) As per the Additional Conditions of Tender.

b) Secondly, a further risk analysis may be performed on the Tenderers having the highest ranking / number of points to ascertain if any of the following, as relevant, presents an unacceptable commercial risk to the employer in terms of:

i) The contents of project specific tender returnable will be assessed i.e. project specific resources, professional indemnity insurance, professional registration, approach and methodology which are to be included in the contract.

ii) The placement of tendered resources will be assessed to ensure that resources indicated by CV’s and tendered to work on the program will indeed work on the program and will not be replaced by more junior or less competent resources.

27 STATUS OF BID

27.1 Each Bid constitutes an irrevocable offer by the Bidder to the DBSA to provide the Services required and otherwise to satisfy the requirements of the Specification as set out in this RFP.

27.2 A Bid must not be conditional on:

27.2.1 the Board approval of the Bidder or any related governing body of the Bidder being obtained;

27.2.2 the Bidder conducting due diligence or any other form of enquiry or investigation;

27.2.3 the Bidder (or any other party) obtaining any regulatory approval or consent;

27.2.4 the Bidder obtaining the consent or approval of any third party; or

27.2.5 the Bidder stating that it wishes to discuss or negotiate any commercial terms of the contract.

27.3 The DBSA may, in its absolute discretion, disregard any Bid that is, or is stated to be, subject to any one or more of the conditions detailed above (or any other relevant conditions).
27.4 The DBSA reserves the right to accept a Bid in part or in whole or to negotiate with a Bidder in accordance with the provisions of this RFP and the applicable laws and regulations.

28 CLARIFICATION OF BIDS
28.1 The DBSA may seek clarification from and enter into discussions with any or all of the Bidders in relation to their Bid. The DBSA may use the information obtained when clarification is sought, or discussions are had in interpreting the Bid and evaluating the cost and risk of accepting the Bid. Failure to supply clarification to the satisfaction of the DBSA may render the Bid liable to disqualification.

28.2 The DBSA is under no obligation to seek clarification of anything in a Bid and reserves the right to disregard any clarification that the DBSA considers to be unsolicited or otherwise impermissible or irrelevant in accordance with the rules set out in this RFP.

29 DISCUSSION WITH BIDDERS
29.1 The DBSA may elect to engage in detailed discussions with any one or more Bidder(s), with a view to maximising the benefits of this RFP as measured against the evaluation criteria and in fully understanding a Bidder’s offer.

29.2 The DBSA is under no obligation to undertake discussions with, and Bidders.

29.3 In addition to presentations and discussions, the DBSA may request some or all Bidders to:
   29.3.1 conduct a site visit, if applicable;
   29.3.2 provide references or additional information;

30 SUCCESSFUL BIDS
30.1 Selection as a successful Bidder does not give rise to a contract (express or implied) between the successful Bidder and the DBSA for the supply of the Services. No legal relationship will exist between the DBSA and a successful Bidder for the supply of the Services until such time as a binding contract is executed by them.

30.2 The DBSA may, in its absolute discretion, decide not to enter into pre-contractual negotiations with a successful Bidder.

30.3 A Bidder is bound by its Bid and all other documents forming part of the Bidder’s Response and, if selected as a successful Bidder, must enter into a contract on the basis of the Bid with or without further negotiation.
31  **NO OBLIGATION TO ENTER INTO CONTRACT**

31.1 The DBSA is under no obligation to appoint a successful Bidder or Bidders (as the case may be), or to enter into a contract with a successful Bidder or any other person, if it is unable to identify a Bid that complies in all relevant respects with the requirements of the DBSA, or if due to changed circumstances, there is no longer a need for the Services requested, or if funds are no longer available to cover the total envisaged expenditure. For the avoidance of any doubt, in these circumstances the DBSA will be free to proceed via any alternative process.

31.2 The DBSA may conduct a debriefing session for all Bidders (successful and unsuccessful). Attendance at such debriefing session is optional.

32  **BIDDER WARRANTIES**

32.1 By submitting a Bid, a Bidder warrants that:

32.1.1 it did not rely on any express or implied statement, warranty or representation, whether oral, written, or otherwise made by or on behalf of the DBSA, its officers, employees, or advisers other than any statement, warranty or representation expressly contained in the RFP;

32.1.2 it did not use the improper assistance of DBSA’s employees or information unlawfully obtained from them in compiling its Bid;

32.1.3 it is responsible for all costs and expenses related to the preparation and lodgement of its Bid, any subsequent negotiation, and any future process connected with or relating to the Tendering Process;

32.1.4 it accepts and will comply with the terms set out in this RFP; and

32.1.5 it will provide additional information in a timely manner as requested by the DBSA to clarify any matters contained in the Bid.

33  **DBSA’S RIGHTS**

33.1 Notwithstanding anything else in this RFP, and without limiting its rights at law or otherwise, the DBSA reserves the right, in its absolute discretion at any time, to:

33.1.1 cease to proceed with, or suspend the Tendering Process prior to the execution of a formal written contract;

33.1.2 alter the structure and/or the timing of this RFP or the Tendering Process;

33.1.3 vary or extend any time or date specified in this RFP
33.1.4 terminate the participation of any Bidder or any other person in the Tendering Process;
33.1.5 require additional information or clarification from any Bidder or any other person;
33.1.6 provide additional information or clarification;
33.1.7 negotiate with any one or more Bidder;
33.1.8 call for new Bid;
33.1.9 reject any Bid received after the Closing Time; or
33.1.10 reject any Bid that does not comply with the requirements of this RFP.

34 GOVERNING LAWS

34.1 This RFP and the Tendering Process are governed by the laws of the Republic of South Africa.
34.2 Each Bidder must comply with all relevant laws in preparing and lodging its Bid and in taking part in the Tendering Process.
34.3 All Bids must be completed using the English language and all costing must be in South African Rand.

35 MANDATORY QUESTIONS

35.1 Bidders shall provide full and accurate answers to all (including mandatory) questions posed in this document, and, are required to explicitly state "Comply/Accept" or "Do not comply/Do not accept" (with a ✔ or an X) regarding compliance with the requirements. Where necessary, the Bidders shall substantiate their response to a specific question.

NOTE: It is mandatory for Bidders to complete or answer this part fully; failure to do so result the Bid being treated as incomplete the Bid may be disqualified.

35.1.1

This Bid is subject to the General Conditions of Contract stipulated in this RFP document.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

35.1.2

The laws of the Republic of South Africa shall govern this RFP and the Bidders hereby accept that the courts of the Republic of South Africa shall have the jurisdiction.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>
### 35.1.3

The DBSA shall not be liable for any costs incurred by the Bidder in the preparation of response to this RFP. The preparation of response shall be made without obligation to acquire any of the items included in any Bidder’s proposal or to select any proposal, or to discuss the reasons why such vendor’s or any other proposal was accepted or rejected.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

### 35.1.4

The DBSA may request written clarification or further information regarding any aspect of this proposal. The Bidders must supply the requested information in writing within two working days after the request has been made, otherwise the proposal may be disqualified.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

### 35.1.5

In the case of Consortium, Joint Venture or subcontractors, Bidders are required to provide copies of signed agreements stipulating the work split and Rand value.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

### 35.1.6

In the case of Consortium, Joint Venture or subcontractors, all Bidders are required to provide mandatory documents as stipulated in schedule 1 of the Response format.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

### 35.1.7

The DBSA reserves the right to; cancel or reject any proposal and not to award the proposal to the lowest Bidder or award parts of the proposal to different Bidders, or not to award the proposal at all.

| Accept | Do not accept |
### 35.1.8
Where applicable, Bidders who are distributors, resellers and installers of network equipment are required to submit back-to-back agreements and service level agreements with their principals.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 35.1.9
By submitting a proposal in response to this RFP, the Bidders accept the evaluation criteria as it stands.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 35.1.10
Where applicable, the DBSA reserves the right to run benchmarks on the requirements equipment during the evaluation and after the evaluation.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 35.1.11
The DBSA reserves the right to conduct a pre-award survey during the source selection process to evaluate contractors' capabilities to meet the requirements specified in the RFP and supporting documents.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 35.2
Only the solution commercially available at the proposal closing date shall be considered. No Bids for future solutions shall be accepted.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 35.2.1
The Bidder should not qualify the proposal with own conditions. **Caution**: If the Bidder does not specifically withdraw its own conditions of proposal when called upon to do so, the proposal response shall be declared invalid.

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
35.2.2

| Should the Bidder withdraw the proposal before the proposal validity period expires, the DBSA reserves the right to recover any additional expense incurred by the DBSA having to accept any less favourable proposal or the additional expenditure incurred by the DBSA in the preparation of a new RFP and by the subsequent acceptance of any less favourable proposal. | Accept | Do not accept |

35.2.3

| Delivery of and acceptance of correspondence between the DBSA and the Bidder sent by prepaid registered post (by air mail if appropriate) in a correctly addressed envelope to either party’s postal address or address for service of legal documents shall be deemed to have been received and accepted after (2) two days from the date of postage to the South African Post Office Ltd. | Accept | Do not accept |

35.2.4

| Should the parties at any time before and/or after the award of the proposal and prior to, and-or after conclusion of the contract fail to agree on any significant product price or service price adjustments, change in technical specification, change in services, etc. The DBSA shall be entitled within 14 (fourteen) days of such failure to agree, to recall the letter of award and cancel the proposal by giving the Bidder not less than 90 (ninety) days written notice of such cancellation, in which event all fees on which the parties failed to agree increases or decreases shall, for the duration of such notice period, remain fixed on those fee/price applicable prior to the negotiations. Such cancellation shall mean that The DBSA reserves the right to award the same proposal to next best Bidders as it deems fit. | Accept | Do not accept |
### 35.2.5

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the case of a consortium or JV, each of the authorised enterprise’s members and/or partners of the different enterprises must co-sign this document.</td>
<td></td>
</tr>
</tbody>
</table>

### 35.2.6

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any amendment or change of any nature made to this RFP shall only be of force and effect if it is in writing, signed by THE DBSA signatory and added to this RFP as an addendum.</td>
<td></td>
</tr>
</tbody>
</table>

### 35.2.7

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Failure or neglect by either party to (at any time) enforce any of the provisions of this proposal shall not, in any manner, be construed to be a waiver of any of that party's right in that regard and in terms of this proposal. Such failure or neglect shall not, in any manner, affect the continued, unaltered validity of this proposal, or prejudice the right of that party to institute subsequent action.</td>
<td></td>
</tr>
</tbody>
</table>

### 35.2.8

<table>
<thead>
<tr>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bidders who make use of subcontractors. The proposal shall however be awarded to the Bidder as a primary contractor who shall be responsible for the management of the awarded proposal. A Bidder which was awarded the contract after scoring HDI / RDP goals is not allowed to subcontract more than 25% of the contract to a non-HDI entity. No separate contract shall be entered into between the DBSA and any such subcontractors. Copies of the signed agreements between the relevant parties must be attached to the proposal responses.</td>
<td></td>
</tr>
</tbody>
</table>
35.2.9

| All services supplied in accordance with this proposal must be certified to all legal requirements as per the South African law. | Accept | Do not accept |

35.2.10

| No interest shall be payable on accounts due to the successful Bidder in an event of a dispute arising on any stipulation in the contract. | Accept | Do not accept |

35.2.11

| Evaluation of Bids shall be performed by an evaluation panel established by The DBSA. Bids shall be evaluated on the basis of conformance to the required specifications as outlined in the RFP. Points shall be allocated to each Bidder, on the basis that the maximum number of points that may be scored for price is 80, and the maximum number of preference points that may be claimed for BEE (according to the PPPFA) is 20. | Accept | Do not accept |

35.2.12

| If the successful Bidder disregards contractual specifications, this action may result in the termination of the contract. | Accept | Do not accept |

35.2.13

| The Bidders’ response to this Bid, or parts of the response, shall be included as a whole or by reference in the final contract. | Accept | Do not accept |
35.2.14

<table>
<thead>
<tr>
<th>Should the evaluation of this Bid not be completed within the validity period of the Bid, the DBSA has discretion to extend the validity period.</th>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

35.2.15

<table>
<thead>
<tr>
<th>Upon receipt of the request to extend the validity period of the Bid, the Bidder must respond within the required time frames and in writing on whether or not he agrees to hold his original Bid response valid under the same terms and conditions for a further period.</th>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

35.2.16

<table>
<thead>
<tr>
<th>Should the Bidder change any wording or phrase in this document, the Bid shall be evaluated as though no change has been effected and the original wording or phrasing shall be used.</th>
<th>Accept</th>
<th>Do not accept</th>
</tr>
</thead>
</table>

Signature(s) of Bidder or assignee(s) | Date

Name of signing person (in block letters)

Capacity

Are you duly authorized to sign this Bid?

Name of Bidder (in block letters)
Postal address (in block letters)
Domicilium citandi et executandi in the RSA (full street address of this place) (in block letters)

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

Telephone Number:…………………………….. FAX number……………………………………

Cell Number:……………………………………

Email Address…………………………………………………………………………………………
PART D: TERMS OF REFERENCE & PROJECT BRIEF

TERMS OF REFERENCE

1 SCOPE OF WORK OF THESE TERMS OF REFERENCES
The scope of work for these Terms of Reference act as a guideline to Professional service providers (PSPs).

2 PROJECT DURATION
The contract duration for the PSPs is for a maximum of Three years starting from the date of appointment subject to availability of funding, performance of the PSP, and impact of the programme as evaluated on an annual and mid-term basis.

3 LOGISTIC SUPPORT
The PSPs’ resources will be responsible for providing their own tools, including their own laptop, cell phone and transportation for the duration of this contract. All disbursement claims incurred, as part of this contract will be payable (reimbursed) in line with the existing policy or any other directive. Resources should be available to undertake travel to provide support to the provinces and municipalities as their work may require.

4 CONTRACT MANAGEMENT AND REPORTING
The Development Bank of South Africa (DBSA) will contract the PSPs. DBSA will be responsible for the contract administration.

The resources will report to the Chief Director or his nominee within the National Treasury in relation to the required services.

5 INDEPENDENT CONTRACTOR RELATIONSHIP
PSPs shall be appointed on an independent contractor basis and no employment relationship will arise between the PSPs, their resources/employees and the DBSA/National Treasury (NT). PSPs and/or their resources/employees shall not be entitled to any of the benefits available to the DBSA’s/NT’s employees including, but not limited to, medical aid, leave pay, sick leave and pension benefits.

6 RATE
PSPs will be paid a fixed hourly rate for the duration of the contract.

7 KNOWLEDGE TRANSFER
The appointed PSPs will be expected to transfer knowledge to allocated official(s).

8 SUBMISSION REQUIREMENTS
PSPs when submitting their proposals must observe the following minimum requirements:

(i) Curriculum Vitae of identified resources;
(ii) Relevant contactable referees must accompany work experience referenced on the Curriculum Vitae;
(iii) Submissions must include certified qualifications of the identified resources;
(iv) **PSPs are allowed to apply for a maximum of two (2) positions only and may only submit a maximum of one (1) Curriculum Vitae per position**;
(v) Submissions that do not meet these minimum requirements will be disqualified without being assessed.
(vi) Bidders must indicate clearly the services they are bidding for on the front page.
9 EVALUATION PROCESSES AND METHODOLOGY

(i) The evaluation process will be conducted at two levels, technical and financial. For the technical evaluation, proposals must meet a minimum score of 70 out of 100 points.

(ii) Any proposal not meeting the minimum score of seventy points on the technical evaluation will be deemed none responsive and will not proceed to be evaluated for price.

The Functional Criteria that will be applied to test the capability of Bidders are as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Functionality Criteria</th>
<th>Points (Maximum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Track record and experience in similar work and demonstrated practical knowledge:</td>
<td>45</td>
</tr>
<tr>
<td>2.</td>
<td>Qualifications</td>
<td>20</td>
</tr>
<tr>
<td>3.</td>
<td>Approach and understanding of the brief.</td>
<td>35</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>
SCOPE OF WORK PER CATEGORY

10.1 IDMS STRATEGIC PROGRAMME MANAGEMENT SERVICES

<table>
<thead>
<tr>
<th>Required Services</th>
<th>IDMS STRATEGIC PROGRAMME MANAGEMENT SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>Responsible to provide a strategic direction and management of the Infrastructure Delivery Management Body of Knowledge (IDMSBOK).</td>
</tr>
<tr>
<td>Scope of work</td>
<td>The scope of work of this Terms of Reference is:</td>
</tr>
</tbody>
</table>

(i) To specifically provide strategic advice on the following IDMSBOK workstreams:
- The enhancement of the IDMS, FIDPM and IDM Toolkit;
- IDMS Structured Training;
- IDMS Curricula;
- IDMS Research Programme
- Dynamic IDMS Knowledge Transfer; and
- Infrastructure Delivery Management System Body of Knowledge (IDMSBOK), including the establishment and management of a help and support desk function for the IDMSBOK.

(ii) To coordinate the integration and alignment of all the IDMSBOK project streams;
(iii) Execute and advise on the strategic alignment of provincial IDMS Protocols;
(iv) Assist with the development of the long term strategic goals;
(v) To support the process of identifying competent officials to capacitate the help and support desk function of the IDMSBOK;
(vi) coordination and facilitation to all stakeholders and role players including political office bearers;
(vii) To support the CD: PLGI with strategic communication pertaining to the IDMS; and
(viii) To act as coach and mentor for personnel in the Chief Directorate: PLGI.

Outputs

The following outputs will be expected from the professional service provider:

(i) An inception report to be produced within 30 working days from the date of the letter of appointment;
(ii) Detailed workplan that integrates all the IDMSBOK project streams;
(iii) Strategic documents to guide and support the effective implementation of the IDMSBOK, including but not limited to:
- Strategic communication and stakeholder management plan.
- Strategic communication briefs according to need.
- Strategic IDMSBOK risk and mitigation plan.
- Strategic Integration plan to improve the effectiveness and efficiency of the IDMSBOK interactive IT Platform.
- Bi-annual Mentoring and coaching reports.

Qualification(s)

A Masters degree in Business Management/ Public Administration and Governance/Built Environment.
IDMS STRATEGIC PROGRAMME MANAGEMENT SERVICES

Registration with relevant built environment professional council will be an added advantage

Experience

(i) Specific experience pertaining to:

i. Governance methodology and public administration
   
   o Experience of the government institutional environment (this will be proved by the number of years’ experience within any sphere of government)

ii. Infrastructure delivery management systems utilised within the public sector

iii. Stakeholder management techniques and methodology

iv. Strategic communication

Points will be awarded to PSP who are able to show the following skills and competencies

(i) Knowledge of government legislation and regulations;
(ii) Good communication, report writing and presentation skills;
(iii) Ability to successfully engage with multi-disciplinary and multi-cultural teams / stakeholders;
(iv) Ability to consult with stakeholders and role-players on a strategic and operational level within the infrastructure delivery environment;
(v) Proven knowledge of the public sector;
(vi) Ability to work under pressure and stressful situations, and to meet tight deadlines; and
(vii) High level of attention to detail and accuracy.

Evaluation Criteria

<table>
<thead>
<tr>
<th>QUALIFICATIONS (20 POINTS)</th>
<th>Score</th>
<th>Scoring Criteria</th>
<th>QUALIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Points</td>
<td>20</td>
<td>20 = Doctoral degree</td>
<td>Minimum qualification of an Honours degree in Business Management/ Public Administration and Governance/ Built Environment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15 = Masters degree or above</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>10 = Honours degree</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>5 = no relevant qualification</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPERIENCE (45 POINTS)</th>
<th>Score</th>
<th>Scoring Criteria</th>
<th>EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Points</td>
<td>15</td>
<td>15 = &gt;8 years</td>
<td>Governance methodology and public administration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12 = &gt;5-8 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>9 = &gt;3-5 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6 = &gt;1-3 years</td>
<td></td>
</tr>
</tbody>
</table>
## Required Services

<table>
<thead>
<tr>
<th>IDMS STRATEGIC PROGRAMME MANAGEMENT SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 = &lt;1 year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>15</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 = &gt;8 years</td>
</tr>
<tr>
<td>12 = &gt;5-8 years</td>
</tr>
<tr>
<td>9 = &gt;3-5 years</td>
</tr>
<tr>
<td>6 = &gt;1-3 years</td>
</tr>
<tr>
<td>3 = &lt;1 year</td>
</tr>
<tr>
<td>Infrastructure Delivery Management</td>
</tr>
<tr>
<td>in the Public Sector</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>10</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 = &gt;8 years</td>
</tr>
<tr>
<td>8 = &gt;5-8 years</td>
</tr>
<tr>
<td>6 = &gt;3-5 years</td>
</tr>
<tr>
<td>4 = &gt;1-3 years</td>
</tr>
<tr>
<td>2 = &lt;1 year</td>
</tr>
<tr>
<td>Stakeholder management techniques</td>
</tr>
<tr>
<td>and methodology</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 = &gt;8 years</td>
</tr>
<tr>
<td>4 = &gt;5-8 years</td>
</tr>
<tr>
<td>3 = &gt;3-5 years</td>
</tr>
<tr>
<td>2 = &gt;1-3 years</td>
</tr>
<tr>
<td>1 = &lt;1 year</td>
</tr>
<tr>
<td>Strategic communication</td>
</tr>
</tbody>
</table>

## APPROACH AND UNDERSTANDING OF BRIEF (35)

<table>
<thead>
<tr>
<th>Points</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score 0</td>
<td>• Bidder has submitted no information or inadequate information to determine scoring level.</td>
</tr>
<tr>
<td>Poor (Score 10)</td>
<td>• Bidder has submitted information with limited understanding of the project objectives and its scope of work.</td>
</tr>
<tr>
<td>Adequate (Score 15)</td>
<td>• Bidder has submitted information, which demonstrate adequate understanding of the project objectives and its scope of work (concise and logical).</td>
</tr>
<tr>
<td>Good (Score 25)</td>
<td>• Bidder has submitted information, which demonstrate in-depth understanding of the project objectives, and its scope of work (clear, concise and logical) and.</td>
</tr>
<tr>
<td></td>
<td>• Proposal addressed certain areas of the requirements.</td>
</tr>
<tr>
<td>Excellent (Score 35)</td>
<td>• Bidder has submitted information which demonstrate in-depth understanding of the project objectives and its scope of work (clear, concise and logical).</td>
</tr>
</tbody>
</table>
### Required Services

<table>
<thead>
<tr>
<th>IDMS STRATEGIC PROGRAMME MANAGEMENT SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Proposal addressed all areas of the requirements and proposed value-add items such as interesting approaches are suggested for undertaking the project.</td>
</tr>
</tbody>
</table>

### 10.2 SERVICES FOR THE MAPPING AND ALIGNING OF IDMS MODULES WITH SECTORIAL UNIT STANDARDS

#### Required Services

<table>
<thead>
<tr>
<th>Mapping and Aligning of IDMS Modules with Sectorial Unit Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
</tr>
</tbody>
</table>

The objective of the IDMS learning support programme is to equip public sector infrastructure practitioners with the necessary skills and knowledge to manage and apply the Infrastructure Delivery Management System (IDMS) to support effective infrastructure service delivery through a structured unit standard based training programme.

The curriculum design for the learning support program must be focused on a blended learning approach that will enable the use of online learning as well as face to face learning.

#### Scope of work

Based on the above objective, the professional service provider will be responsible for delivering on the following scope of work:

- (viii) Map and align the IDMS modules with the existing qualifications and/or unit standards as registered on SAQA and from the relevant Sector Education Training Authorities (SETAs) or QCTO;
- (ix) Provide recommendations on the best fit against qualifications/unit standards in order to formalise the IDMS methodology as a credit bearing learning programme that can be attended by all infrastructure practitioners in government;
- (x) Facilitate the process with the relevant SETA or the QCTO to register the skills programme as a formal skills programme;
- (xi) Customise for the relevant authorities within the institutions e.g. Technical Experts; Accounting Officers, CFOs, Finance practitioners and Municipal Councillors responsible for infrastructure oversight.

#### Outputs

1. An inception report to be produced within 30 working days from the date of the letter of appointment;
2. A workplan;
3. A report where the mapped IDMS modules are linked with existing qualifications and/or unit standards that are registered with SAQA;
4. Recommendations on best fit for structured IDMS training utilising qualifications/unit standards.
Required Services

Mapping and Aligning of IDMS Modules with Sectorial Unit Standards

(v) Engage with the relevant authority to sign off on curriculum and approve registration of said skills programme

(vi) Develop a Programme Strategy and Design Matrix for the IDMS Unit Standard Structured Training, which outlines the following, among others:
   - Programme purpose and outcomes;
   - Design and assessment strategies; and
   - Resource and delivery implications

Qualification(s)

The PSP must have a recognised Bachelor's Degree qualification (NQF level 7) or equivalent in Supply Chain Management; Financial Management, Public Financial Management, Business Administration, Public Administration, Portfolio-, Programme and Project Management, Asset Management and Procurement Management or equivalent qualifications in a field relevant to this assignment.

Level of experience

The preferred resource should have experience in the following areas:

(xii) 10 years’ general working experience in public and/or private sector training environment;

(xiii) Developed at least 3 public sector unit standard credit bearing learning programmes (SETA);

(xiv) Experience in developing at least one (1) Infrastructure Management or related training solution in the public and/or private sector will be an added advantage; and

(xv) 5 Years’ experience in the SETAs landscape in training and development or consulting.

Points will be awarded to PSP who are able to show the following skills and competencies

(xvi) Knowledge of government legislation and regulations;

(xvii) Good communication, report writing and presentation skills;

(xviii) Ability to successfully engage with multi-disciplinary and multi-cultural teams / stakeholders;

(xix) Ability to consult with stakeholders and role-players on a strategic and operational level within the infrastructure delivery environment;

(xx) Proven knowledge of the public sector;

(xxi) Ability to work under pressure and stressful situations, and to meet tight deadlines; and

(xxii) High level of attention to detail and accuracy.

Evaluation Criteria

QUALIFICATIONS (15 POINTS)
# Required Services

**Mapping and Aligning of IDMS Modules with Sectorial Unit Standards**

<table>
<thead>
<tr>
<th>Points</th>
<th>Scoring Criteria</th>
<th>QUALIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td></td>
<td>Minimum qualification required is a Bachelor’s degree in supply chain management; Financial Management, Public Financial Management, Business Administration, or Public Administration, Portfolio-, Programme and Project Management, Asset Management and Procurement Management or equivalent qualifications in a field relevant to this assignment.</td>
</tr>
</tbody>
</table>

## EXPERIENCE (45 POINTS)

<table>
<thead>
<tr>
<th>Points</th>
<th>Scoring Criteria</th>
<th>EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td>General working experience in public and/or private sector training environment.</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>Experience in the SETAs landscape in training, in development and consulting</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>Developed public sector unit standard credit bearing learning programmes (SETA);</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Experience in the development of Infrastructure Training solutions in the public and/or private sector</td>
</tr>
</tbody>
</table>

## APPROACH AND UNDERSTANDING OF BRIEF (35)

(Methodology presented to address scope of work)
### 10.3 DESIGN AND DEVELOPMENT OF LEARNING SUPPORT PROGRAMMES

**Objective**

The objective of the IDMS learning support programme is to equip public sector infrastructure practitioners with the necessary skills and knowledge to manage and apply the Infrastructure Delivery Management System (IDMS) to support effective infrastructure service delivery through the development and roll-out of a structured unit standard training programme.

**Scope of work**

The scope of work of this Terms of Reference is:

(i) Utilising the identified IDMS related Unit standards within the various SETA’s to develop and design an IDMS Structured Training Programme for Infrastructure Practitioners within Government. This training programme must be credit bearing aligned to Unit standards. The following requirements must be accommodated:

- Modular structure of the training programme;
- Time needs for each module;
- Unit standards-based linkages and credit bearing;
- Interactive skills development programme approach including presentations, public sector related case studies, group discussions and activities; and

<table>
<thead>
<tr>
<th>Points</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score 0</td>
<td>• Bidder has submitted no information or inadequate information to determine scoring level.</td>
</tr>
<tr>
<td>Poor (Score 10)</td>
<td>• Bidder has submitted information with limited understanding of the project objectives and its scope of work.</td>
</tr>
<tr>
<td>Adequate (Score 15)</td>
<td>• Bidder has submitted information, which demonstrate adequate understanding of the project objectives and its scope of work (concise and logical).</td>
</tr>
</tbody>
</table>
| Good (Score 25) | • Bidder has submitted information, which demonstrate in-depth understanding of the project objectives and its scope of work (clear, concise and logical) and.  
  • Proposal addressed certain areas of the requirements. |
| Excellent (Score 35) | • Bidder has submitted information which demonstrate in-depth understanding of the project objectives and its scope of work (clear, concise and logical)  
  • Proposal addressed all areas of the requirements and proposed value-add items such as interesting approaches are suggested for undertaking the project. |
Required Services

- The course must be developed in line with online training principles
- Test training course design through piloted training sessions in identified provincial departments and municipalities;
- Enhance training course material where necessary based on feedback received;
- Submit enhanced IDMS Unit Standard credit bearing course material to IDMS Technical Committee for endorsement and approval; and
- Support and facilitate the placement of the IDMS Unit Standard credit bearing course material on the IDMSBOK Interactive IT Platform (The course must comply with online training principles and self-assessment).

Outputs

The following outputs will be expected from the professional service provider:

- An inception report to be produced within 30 working days from the date of the letter of appointment;
- A workplan;
- IDMS Unit standards structured credit bearing course aligned with Unit standards in the various institutions of higher learning;
- Pilot training report of IDMS Structured Unit Standard credit bearing course;
- Enhance IDMS Structured Unit Standard credit bearing course;
- Online IDMS Structured Unit Standard credit bearing course (Placed on IDMSBOK Interactive IT Platform); and
- Develop a Programme Strategy and Design Matrix which outlines the following:
  - Programme purpose and outcomes;
  - Design and assessment strategies; and
  - Resource and delivery implications (roll out methodology).

Qualification(s)

The PSP must have a recognised Bachelor’s Degree qualification (NQF level 7) or equivalent in Supply Chain Management; Financial Management, Public Financial Management, Business Administration, Public Administration, Portfolio-, Programme and Project Management, Asset Management and Procurement Management or equivalent qualifications in a field relevant to this assignment.

Experience

Specific experience pertaining to:

i. 8 years’ general working experience in public and/or private sector training environment;

ii. Development and delivery of at least 5 PFM/MFM related training courses/modules;

iii. Experience in delivering at least one (1) training session on Infrastructure Management or training in the public and/or private sector will be an added advantage; and

iv. 3 Years’ experience as a Constituent Assessor/Moderator in the SETAs landscape or consulting in the ETQA sector.

Skills and Competencies

(i) Knowledge of government legislation and regulations;
### Required Services

Points will be awarded to PSPs who are able to show the following skills and competencies:

1. Good communication, report writing and presentation skills;
2. Ability to successfully engage with multi-disciplinary and multi-cultural teams / stakeholders;
3. Ability to consult with stakeholders and role-players on a strategic and operational level within the infrastructure delivery environment;
4. Proven knowledge of the public sector;
5. Ability to work under pressure and stressful situations, and to meet tight deadlines; and
6. High level of attention to detail and accuracy.

### Evaluation Criteria

<table>
<thead>
<tr>
<th>QUALIFICATIONS (15 POINTS)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Points</strong></td>
</tr>
<tr>
<td>20</td>
</tr>
<tr>
<td>15</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

### EXPERIENCE (45 POINTS)

<table>
<thead>
<tr>
<th>EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Points</strong></td>
</tr>
<tr>
<td>20</td>
</tr>
<tr>
<td>15</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>15</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

- General working experience in public and/or private sector training environment.
- Experience as a Constituent Assessor/Moderator in the SETAs landscape or consulting in the ETQA sector.

---

Page 41 of 73
### Required Services

| 15 | 15 = 5 Credit bearing PFM Training Courses  
12 = 4 Credit bearing PFM Training Courses  
8 = 3 Credit bearing PFM Training Courses  
4 = 2 Credit bearing PFM Training Courses  
2 = 1 Credit bearing PFM Training Courses | Developed and delivered PFM related training courses/modules. |
|---|---|---|
| 5 | 5 = 4 and more Training Solutions  
4 = 3 Training Solutions  
3 = 2 Training Solutions  
2 = 1 Training Solution  
0 = No Training solution | Experience in developing Infrastructure Management or related training solution in the public and/or private sector. |

### APPROACH AND UNDERSTANDING OF BRIEF (35)

<table>
<thead>
<tr>
<th>Points</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Score 0</strong></td>
<td>• Bidder has submitted no information or inadequate information to determine scoring level.</td>
</tr>
<tr>
<td><strong>Poor (Score 10)</strong></td>
<td>• Bidder has submitted information with limited understanding of the project objectives and its scope of work.</td>
</tr>
<tr>
<td><strong>Adequate (Score 15)</strong></td>
<td>• Bidder has submitted information, which demonstrate adequate understanding of the project objectives and its scope of work (concise and logical).</td>
</tr>
</tbody>
</table>
| **Good (Score 25)** | • Bidder has submitted information, which demonstrate in-depth understanding of the project objectives, and its scope of work (clear, concise and logical); and  
• Proposal addressed certain areas of the requirements. |
| **Excellent (Score 35)** | • Bidder has submitted information which demonstrate in-depth understanding of the project objectives and its scope of work (clear, concise and logical).  
• Proposal addressed all areas of the requirements and proposed value-add items such as interesting approaches are suggested for undertaking the project. |
10.4 IDMS HELP DESK AND SUPPORT SERVICES

Objective

To support the National Treasury (NT) with the advisory services and queries pertaining to the IDMS.

To focus specifically on the institutionalisation and sustainability of the IDMS through the provisioning of a participative, supportive and collaborative help desk function to infrastructure practitioners.

This service will be facilitated through an interactive help and support desk function that will be available to infrastructure practitioners in all spheres of government to focus on guiding them to utilise the IDMS methodology effectively and efficiently.

Supporting with problem solving interventions, development of best practice methodologies, training and developmental interventions and the general enhancement of the IDMS Body of Knowledge.

Scope of work

(xxiii) The IDMSBOK support and help desk function for infrastructure practitioners, role players and stakeholders will focus on the following five (5) core areas:

   a) Portfolio, Programme and Project Management processes;
   b) Infrastructure Planning, Budgeting and Finance;
   c) Asset Management, Infrastructure Operations and Maintenance;
   d) Infrastructure Procurement Management; and
   e) IDMS Institutionalisation, Stakeholder Management and Governance.

(xxiv) These core functions should be supported by:

   a) Problem Solving Methodology;
   b) Dynamic Knowledge Transfer Methodology; and
   c) Mentoring and Coaching Methodology.

(xxv) Based on the above objective, the professional service provider(s) will be responsible for:

   a) Work in collaboration with all IDMSBOK professional service providers on the IDMS, IDM Toolkit, IDMS Management Companion; the IDMS for Buddies and the dynamic IDMS knowledge transfer process;
   b) Development of the IDMS support and help desk user and service protocol;
   c) Guidance to all infrastructure practitioners and role-players with the utilisation of the IDMS and IDM Toolkits;
Services Required  IDMS HELP DESK AND SUPPORT SERVICES
  
d) Respond effectively and efficiently to helpdesk logged IDMS related questions from infrastructure practitioners, role players and stakeholders in all spheres of government;

e) Develop best practice methodologies and deliverables for specific and unique challenges registered by infrastructure practitioners, role players and stakeholders;

f) Continuously enhance the frequently asked questions (FAQ’s) knowledge segment on the IDMSBOK Interactive IT Platform;

g) Proactively develop IDMS training material based on identified and anticipated needs;

h) Present and/or facilitate training interventions in consultation with the dynamic knowledge transfer processes and professional service providers;

i) Develop and submit technical recommendations on all IDMS and IDM Toolkit enhancements to the IDMS Technical Committee for endorsement and approval;

j) Supply a mentoring and coaching function to infrastructure officials;

k) Collaboratively maintain an IDMSBOK Risk and Issue log;

l) Attend and participate in the monthly coordination meetings and workshops.

m) Support the IDMS Knowledge Management Project Champion and IDMS Programme Manager as and when required, e.g. with operational and project tasks;

Outputs  The following outputs will be expected from these professional service providers:

(xxvi) Inception report;

(xxvii) High level work plan;

(xxviii) Enhancement of the following:

  a) IDM Toolkits,
  b) IDMS Management Companion,
  c) IDMS Framework Guideline;
  d) IDMS for Buddies; and
  e) Local Government IDMS Toolkit.

(xxix) Maintained and enhanced log of frequently asked questions;
Services Required  IDMS HELP DESK AND SUPPORT SERVICES
(xxx) Best Practice Methodologies, Standard Operating Procedures (SOP’s) and IDMS Templates developed and maintained;
(xxxi) IDMS solutions generated addressing registered problem areas;
(xxxii) IDMS training material developed and presented (Knowledge Circles, CoPs and structured training);
(xxxiii) Record of:
  a) Training interventions conducted,
  b) Train-the-trainer sessions facilitated
  c) Specific training presented
  d) Community of Practice that exists
  e) Community of Practice facilitated and supported
  f) Structured Community of Practice interventions
  g) Training
(xxxiv) Mentoring and coaching interventions for the Chief Directorate: PLGI;
(xxxv) IDMSBOK Risk and Issue Log; and,
(xxxvi) Monthly progress reports.

Qualification(s) Preferred professional service provider(s) should preferably have a post-graduate qualification in one or more of the following disciplines and fields:
(xxxvii) Built environment;
(xxxviii) Public administration and governance; and
(xxxix) Public and municipal finance management;

Experience The preferred professional service provider(s) should have experience in the following areas:
(xi) Infrastructure Delivery Management in the public sector
(xli) Programme and project management
(xlii) Development of courses and training material
(xliii) Development of best practice methodologies
(xliv) Facilitation of training
(xlv) Process mapping and facilitation

Points will be awarded to PSP who are able to show the following skills
(xlv) Knowledge of the Infrastructure Delivery Management in the public sector
(xlvu) Knowledge transfer and facilitation
(xlvii) Knowledge of government legislation and regulations;
(xlvii) Proven knowledge of the public sector;
Services Required and competencies

IDMS HELP DESK AND SUPPORT SERVICES

(i) Good communication, report writing and presentation skills;
(ii) Ability to successfully engage with multi-disciplinary and multi-cultural teams / stakeholders;
(iii) Ability to consult with stakeholders and role-players on a strategic and operational level within the infrastructure delivery environment.
(iv) Ability to work under pressure and stressful situations, and to meet tight deadlines;
(v) High level of attention to detail and accuracy;
(vi) Ability to plan and organize multiple simultaneous tasks efficiently;
(vii) Infrastructure supply chain management;
(viii) Programme and project management;
(ix) Problem solving management; and
(x) Infrastructure Financial Management;

Evaluation Criteria

<table>
<thead>
<tr>
<th>Points</th>
<th>Scoring Criteria</th>
<th>QUALIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>20 = Masters degree or above 15 = Honours degree 10 = Degree 5 = no relevant qualification</td>
<td>Post-graduate qualification in one of the following:  • Built environment;  • Public administration and governance; and  • Public and municipal finance management</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Points</th>
<th>Scoring Criteria</th>
<th>EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>15 = &gt;8 years 12 = &gt;5-8 years 9 = &gt;3-5 years 6 = &gt;1-3 years 3 = &lt;1 year</td>
<td>Infrastructure Delivery Management in the public sector</td>
</tr>
<tr>
<td>15</td>
<td>15 = &gt;8 years 12 = &gt;5-8 years 9 = &gt;3-5 years 6 = &gt;1-3 years 3 = &lt;1 year</td>
<td>Development of best practice methodologies, courses and training material</td>
</tr>
</tbody>
</table>
### Services Required IDMS HELP DESK AND SUPPORT SERVICES

<table>
<thead>
<tr>
<th>Points</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Score 0</strong></td>
<td>• Bidder has submitted no information or inadequate information to determine scoring level.</td>
</tr>
<tr>
<td><strong>Poor (Score 10)</strong></td>
<td>• Bidder has submitted information with limited understanding of the project objectives and its scope of work.</td>
</tr>
<tr>
<td><strong>Adequate (Score 15)</strong></td>
<td>• Bidder has submitted information, which demonstrate adequate understanding of the project objectives and its scope of work (concise and logical).</td>
</tr>
</tbody>
</table>
| **Good (Score 25)** | • Bidder has submitted information, which demonstrate in-depth understanding of the project objectives, and its scope of work (clear, concise and logical) and  
• Proposal addressed certain areas of the requirements. |
| **Excellent (Score 35)** | • Bidder has submitted information which demonstrate in-depth understanding of the project objectives and its scope of work (clear, concise and logical)  
• Proposal addressed all areas of the requirements and proposed value-add items such as interesting approaches are suggested for undertaking the project. |
## 10.5 DATA ANALYSIS SERVICES

<table>
<thead>
<tr>
<th>Required Services</th>
<th>DATA ANALYSIS SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>To support the monitoring and overseeing of the provincial infrastructure project related data capturing, analysis, information classification and financial data improvement within the National Treasury Chief Directorate: Provincial and Local Government Infrastructure (CD:PLGI).</td>
</tr>
<tr>
<td>Scope of work</td>
<td>Effective stakeholder management aligned to the legal mandates of each stakeholder to facilitate seamless flow of data and information</td>
</tr>
<tr>
<td></td>
<td>• Validate and update financial and non-financial information for infrastructure submitted by the Provinces.</td>
</tr>
<tr>
<td></td>
<td>• Managed effectively any deviations and/gaps in information and updating of the information between the IRM, IYM, and BAS/Vulindlela.</td>
</tr>
<tr>
<td></td>
<td>• Analyse the IRM information and compile provincial and national monthly reports to assist provinces in improving the quality of information on the system. Provide recommendations to management on how to improve the systems.</td>
</tr>
<tr>
<td></td>
<td>• Analyse the IRM information and compile monthly reports with recommendation to assist management in making policy decision</td>
</tr>
</tbody>
</table>

### Outputs
The following outputs will be expected from the professional service provider:

- (i) Improved project information on the Infrastructure Reporting Model for decision making processes;
- (ii) The monitoring and reporting systems are implemented, functional and improved.
- (iv) Infrastructure Reporting Model (IRM), BAS and in-year reporting model (IYM)
- (v) Provided information to the management for policy decision making

### Qualification(s)
A minimum of 3 years Degree/Diploma in Finance/Economics/Information Technology or any related field

### Experience
- (ix) Specific experience pertaining to:
  - a) Three years’ relevant experience in a similar function.
  - b) Working experience with data analysis, interpretation and capturing of the facts and figures
  - c) Working Knowledge of Government monitoring and reporting systems
  - d) Experience with accepting responsibility over accuracy of the computer-generated data (CGD)
  - e) Experience in data validation and manipulation.
    - Skills and competencies
      - f) Analytical skills
      - g) Computer literacy (Excel, Word, PowerPoint and Internet)
      - h) Understanding of data quality management/data clean-up;
        - Interpersonal skills
      - i) Computer skills
      - j) Report writing skills
      - k) Ability to work under pressure and pay attention to details

Points will be awarded to PSP who are able to
**Required Services**

DATA ANALYSIS SERVICES  
show the following skills and competencies

---

### Evaluation Criteria

**QUALIFICATIONS (20 POINTS)**

<table>
<thead>
<tr>
<th>Points</th>
<th>Scoring Criteria</th>
<th>QUALIFICATION</th>
</tr>
</thead>
</table>
| 20     | 20 = Master’s degree or above  
         | 15 = Honours degree   
         | 10 = Bachelor’s Degree  
         | 5 = Diploma           | Minimum Degree/Diploma in Finance/Economics/Information Technology or any related field |
|        | 0= Non-relevant qualification | |

**EXPERIENCE (45 POINTS)**

<table>
<thead>
<tr>
<th>Points</th>
<th>Scoring Criteria</th>
<th>EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>15 = &gt;8 years</td>
<td>Working experience with data analysis, interpretation and capturing of the facts and figures</td>
</tr>
<tr>
<td></td>
<td>12 = &gt;5-8 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9 = &gt;3-5 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 = &gt;1-3 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 = &lt;1 year</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>15 = &gt;8 years</td>
<td>Working Knowledge of Government monitoring and reporting systems</td>
</tr>
<tr>
<td></td>
<td>12 = &gt;5-8 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9 = &gt;3-5 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 = &gt;1-3 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 = &lt;1 year</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>10 = &gt;8 years</td>
<td>Experience with accepting responsibility over accuracy of the computer-generated data (CGD)</td>
</tr>
<tr>
<td></td>
<td>8 = &gt;5-8 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 = &gt;3-5 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4 = &gt;1-3 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 = &lt;1 year</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>5 = &gt;8 years</td>
<td>Experience in data validation and manipulation.</td>
</tr>
<tr>
<td></td>
<td>4 = &gt;5-8 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 = &gt;3-5 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 = &gt;1-3 years</td>
<td></td>
</tr>
</tbody>
</table>
Required Services

DATA ANALYSIS SERVICES

1 = <1 year

<table>
<thead>
<tr>
<th>Points</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score 0</td>
<td>• Bidder has submitted no information or inadequate information to determine scoring level.</td>
</tr>
<tr>
<td>Poor (Score 10)</td>
<td>• Bidder has submitted information with limited understanding of the project objectives and its scope of work.</td>
</tr>
<tr>
<td>Adequate (Score 15)</td>
<td>• Bidder has submitted information, which demonstrate adequate understanding of the project objectives and its scope of work (concise and logical).</td>
</tr>
<tr>
<td>Good (Score 25)</td>
<td>• Bidder has submitted information, which demonstrate in-depth understanding of the project objectives, and its scope of work (clear, concise and logical) and. • Proposal addressed certain areas of the requirements.</td>
</tr>
<tr>
<td>Excellent (Score 35)</td>
<td>• Bidder has submitted information which demonstrate in-depth understanding of the project objectives and its scope of work (clear, concise and logical) • Proposal addressed all areas of the requirements and proposed value-add items such as interesting approaches are suggested for undertaking the project.</td>
</tr>
</tbody>
</table>

Signed off on behalf of I Tjale, Director PIPM, Chief Directorate PLGI- National Treasury

KJ Coetzee- Programme Manager IDMS PSO:

11. SUBMISSIONS

Proposals to be loaded on the one drive link sent to you. The closing time for submissions 23H55 (Telkom time) on 17 December 2020
Annexure A/J - Price proposal (please submit your pricing information in a different folder)

The Pricing Schedule must be completed in full and included as Annexure A to all Bids submitted. Professional fees must be included with the other fees e.g. disbursements, Management Fees… In addition to this, the bidder may attach own quote.

PSPs are allowed to apply for a MAXIMUM of TWO (2) positions only and may only submit a maximum of one (1) Curriculum Vitae per position. Bidders will be evaluated on rate per hour.

<table>
<thead>
<tr>
<th>SERVICES REQUIRED 1 -</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Name</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SERVICES REQUIRED 2 -</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Name</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Failure to include/attach pricing data in full may result in the disqualification of the Bid.
Annexure B

CV/s and qualifications of each proposed individual/s and the role that they will play in the services.

This document(s) is to be prepared and submitted by the bidders as Annexure B to their Bid.
TAX CLEARANCE CERTIFICATE REQUIREMENTS

IT IS A CONDITION OF THIS TENDER THAT THE TAXES OF THE TENDERER MUST BE IN ORDER, OR THAT SATISFACTORY ARRANGEMENTS HAVE BEEN MADE WITH THE SOUTH AFRICAN REVENUE SERVICES (SARS) TO MEET THE RESPONDENT’S TAX OBLIGATIONS.

BIDDERS TAX STATUS MUST REMAIN COMPLIANT IN RESPECT TO THE EVALUATION PROCESS THROUGHOUT THE TENDER PROCESS, IN ORDER FOR A BIDDER TO BE EVALUATED.

1. The valid and active Tax Compliance Status Pin issued by the South African Revenue Services must be submitted together with this tender and appended to this page. Failure to submit the valid and active Tax Compliance Status Pin will result in the invalidation/disqualification of the tender submission as per stipulated Responsiveness Evaluation.

2. Valid Tax Compliance is a mandatory requirement for successful bidders post the tender process to be awarded a contract in terms of this tender.

3. Where Joint Ventures/ Consortia/ Associations, etc. are involved, the Tax Compliance status will be based on the main Joint Venture Partners status. However, the Tax Compliance status documentation of all the Joint Venture Partners are to be appended to this page. Any tax noncompliance of any party will require a bidder to provide fully compliant tax status for any award to be made.

I, ___________________________ of ___________________________,

(Authorised Signatory)(Company Name)

Hereby acknowledge having read, understood and agree to the terms and conditions set out in this Returnable and warrant that the documents submitted are true and accurate copies of the originals.

____________________________

(Signature)(Date)
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.

1. 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, shareholder): …………………………………………………………………………………………………………………

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 / personnel numbers must be indicated in paragraph 3 below.

“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.

¹ “Shareholder” means a person who owns shares in the company.
2.7 Are you or any person connected with the bidder presently employed by the state?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

2.7.1 If so, furnish 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?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

2.7.2.1 If yes, did you attached proof of such authority to the bid document?

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

<table>
<thead>
<tr>
<th>YES / NO</th>
</tr>
</thead>
</table>

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?

<table>
<thead>
<tr>
<th>YES / NO</th>
</tr>
</thead>
</table>

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?

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?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

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?

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

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 / Persal Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DECLARATION

I, THE UNDERSIGNED (NAME)…………………………………………………………………………………………

CERTIFY ON BEHALF OF THE BIDDER THAT THE INFORMATION FURNISHED IN THIS DECLARATION 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
Annexure E

SBD 6.1

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

This preference form must form part of all tenders 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 tenders:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included);
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included); and
- if it is unclear which preference point system will be applicable, either the 80/20 or 90/10 preference point system will apply and the lowest acceptable tender will be used to determine the applicable preference point system.

1.2

a) The value of this tender is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable;

1.3 Points for this tender shall be awarded for:
(a) Price; and
(b) B-BBEE Status Level of Contributor.

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

<table>
<thead>
<tr>
<th></th>
<th>POINTS</th>
<th>POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRICE</td>
<td>80</td>
<td>90</td>
</tr>
<tr>
<td>B-BBEE STATUS LEVEL OF CONTRIBUTION</td>
<td>20</td>
<td>40</td>
</tr>
<tr>
<td>TOTAL POINTS FOR PRICE AND B-BBEE MUST NOT EXCEED</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

1.5 Failure on the part of a tenderer to submit proof of B-BBEE Status level of contributor together with the tender, 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 tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the 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) “tender” 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 tendering 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 tender 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:

\[
P_s = 80 \left(1 - \frac{P_t - P_{\text{min}}}{P_{\text{min}}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\text{min}}}{P_{\text{min}}} \right)
\]

Where

- \( P_s \) = Points scored for price of tender under consideration
- \( P_t \) = Price of tender under consideration
- \( P_{\text{min}} \) = Price of lowest acceptable tender
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 tenderer 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 (90/10 system)</th>
<th>Number of points (80/20 system)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>2</td>
<td>9</td>
<td>18</td>
</tr>
<tr>
<td>3</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>12</td>
</tr>
<tr>
<td>5</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>6</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>8</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Non-compliant contributor</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

5. TENDER DECLARATION

5.1 Tenderers 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:........... = ........... (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 (Info must be in line with Returnables T2.3.4 & T2.4.2)

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

(Tick applicable box)

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

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)

<table>
<thead>
<tr>
<th>YES</th>
<th>X</th>
<th>NO</th>
</tr>
</thead>
</table>

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>Designated Group</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

<table>
<thead>
<tr>
<th>Designated Group</th>
<th>EME</th>
<th>QSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any EME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any QSE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

8.6 COMPANY CLASSIFICATION

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

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-BBEE 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 tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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 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 audi alteram partem rule was applied).</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td><strong>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.</strong></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)?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td><strong>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.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2.1</td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td><strong>4.3</strong></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><strong>4.3.1</strong></td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>4.4</strong></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>
<tr>
<td><strong>4.4.1</strong></td>
<td>If so, furnish particulars:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SBD 8**

**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
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.

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.

\(^3\) 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.

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

Signature

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

Date

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

Position

Name of Bidder
Certified copies of all relevant CIPC registration documents listing all members with percentages, in the case of a close corporation
Certified copies of the latest share certificates of all relevant companies
Annexure J

(if applicable): A breakdown of how fees and work will be spread between members of the bidding consortium.
Supporting documents to their responses to the Qualifying Criteria and Evaluation Criteria.
[General Conditions of Contract]

PLEASE NOTE THAT ALL BIDDERS ARE REQUIRED TO READ THROUGH THE GENERAL CONDITIONS OF CONTRACT PRESCRIBED BY THE NATIONAL TREASURY. SUCH GENERAL CONDITIONS OF CONTRACT CAN BE ACCESSED ON THE NATIONAL TREASURY WEBSITE.

PLEASE NOTE FURTHER THAT ALL BIDDERS MUST ENSURE THAT THEY ARE WELL ACQUINTED WITH THE RIGHTS AND OBLIGATIONS OF ALL PARTIES INVOLVED IN DOING BUSINESS WITH GOVERNMENT.

NOTE: All Bidders are required to confirm (*Tick applicable box*) below:

<table>
<thead>
<tr>
<th>Item</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the Bidder familiar with the General Conditions of Contract prescribed by the National Treasury?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Annexure M

CSD Registration Summary Report

REGISTRATION ON THE CENTRAL SUPPLIER DATABASE (CSD) SITE OF THE NATIONAL TREASURY IS A COMPULSORY REQUIREMENT FOR A BIDDER TO CONDUCT BUSINESS WITH THE DBSA. THE ONUS IS ON EACH BIDDER TO REGISTER ON THE CSD SITE AND PROVIDE PROOF OF REGISTRATION ON THE CSD SITE IN THE FORM OF A REPORT AS PRESCRIBED IN THIS ANNEXURE.