

## REQUEST FOR PROPOSALS

<b>YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED</b>	
<b>BID NUMBER:</b>	<b>RFP009/2022</b>
<b>NON-COMPULSORY BRIEFING SESSION DETAILS:</b>	<p>Briefing Session date: <b>24 January 2022</b></p> <p>Briefing Session time: <b>10am</b></p> <p><b>Tender briefing will be done online via Microsoft teams. Bidders must advise of their interest to participate in this tender by sending an email to <a href="mailto:Victorscm@dbsa.org">Victorscm@dbsa.org</a> two (2) days before the briefing meeting so as to be invited</b></p>
<b>CLOSING DATE:</b>	<b>31 January 2022</b>
<b>CLOSING TIME:</b>	23H55
<b>PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:</b>	120 days
<b>DESCRIPTION OF BID:</b>	<b>Appointment of a service provider to design and implement new websites for the IPP Office for a period of 36 months (3 years).</b>
<b>BID DOCUMENTS DELIVERY ADDRESS:</b>	<p><b>1. ELECTRONIC SUBMISSIONS</b></p> <p><b><u>INSTRUCTIONS:</u></b></p> <ul style="list-style-type: none"> <li>➤ Bidders are required to issue Tender Submission Link requests and enquiries to <a href="mailto:VictorSCM@dbsa.org">VictorSCM@dbsa.org</a> <b>ONLY</b>.</li> <li>➤ <b>No</b> – Tender Submission Link requests will be accepted after <b>16h00 on the 26<sup>th</sup> of January 2022</b>. Any requests after the stipulated date will be disregarded.</li> <li>➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically.</li> </ul> <p><b>NB: Electronic submission is encouraged for all bidder's interest in this tender bid</b></p>

	<b>Closing date 31 January 2022 before 23H55 all bids must be in on the 31<sup>st</sup> of January 2022</b>
<b>NAME OF BIDDER:</b>	
<b>CONTACT PERSON:</b>	
<b>EMAIL ADDRESS:</b>	
<b>TELEPHONE NUMBER:</b>	
<b>FAX NUMBER:</b>	
<b>BIDDER'S STAMP OR SIGNATURE</b>	



The Development Bank of Southern Africa has a Zero Tolerance on Fraud and Corruption.  
Report any incidents of Fraud and Corruption to Whistle Blowers on any of the following:

TollFree : 0800 20 49 33  
Email : [dbsa@whistleblowing.co.za](mailto:dbsa@whistleblowing.co.za)  
Free Post : Free Post KZN 665 | Musgrave | 4062  
SMS : 33490

## Contents

<b>PART A .....</b>	<b>4</b>
<b>PART B .....</b>	<b>8</b>
<b>PART C .....</b>	<b>9</b>
<b>PART D .....</b>	<b>11</b>
<b>PART E .....</b>	<b>40</b>
<b>1. INTRODUCTION.....</b>	<b>41</b>
<b>2. PURPOSE .....</b>	<b>41</b>
<b>3. BACKGROUND.....</b>	<b>41</b>
<b>4. SCOPE OF WORK .....</b>	<b>42</b>
<b>4.1. Project 1 – Upgrade of CRM.....</b>	<b>42</b>
<b>4.2. Project 2 – Upgrade of current websites .....</b>	<b>42</b>
4.2.1. DESIGN REQUIREMENTS.....	42
4.2.2. END USER EXPERIENCE:.....	43
4.2.3. BACK-END USER EXPERIENCE:.....	43
4.2.4. ABILITY TO GENERATE REPORTS:.....	43
4.2.5. CONTENT MANAGEMENT FRAMEWORKS.....	43
4.2.6. SECURITY MEASURES.....	44
4.2.7. HOSTING AND MAINTENANCE:.....	44
4.2.8. RIGHTS TO BACK END ACCESS:.....	45
<b>4.3. Project 3 – Deploy New Project Website .....</b>	<b>45</b>
<b>4.4. Possible future Projects .....</b>	<b>45</b>
<b>5. SKILLS REQUIREMENTS .....</b>	<b>45</b>
<b>6. TECHNICAL PROPOSAL.....</b>	<b>46</b>
<b>7. FEE PROPOSAL .....</b>	<b>46</b>
<b>8.1. Part 1 - Technical Evaluation and Scoring.....</b>	<b>48</b>
<b>8.2. Part 2 - Presentation Evaluation and Scoring .....</b>	<b>50</b>
<b>9. DELIVERABLE ACCEPTANCE CRITERIA .....</b>	<b>52</b>
<b>Annexure A .....</b>	<b>52</b>
<b>Fees and Assumptions.....</b>	<b>52</b>
<b>Annexure A - Pricing fee breakdown .....</b>	<b>54</b>
<b>Annexure B .....</b>	<b>56</b>
<b>Annexure C.....</b>	<b>60</b>
<b>Annexure D .....</b>	<b>65</b>
<b>Annexure E.....</b>	<b>67</b>
<b>Annexure F.....</b>	<b>71</b>
<b>Annexure G .....</b>	<b>72</b>
<b>Annexure H .....</b>	<b>73</b>
<b>Annexure I .....</b>	<b>74</b>
<b>Annexure J .....</b>	<b>75</b>
<b>Annexure K .....</b>	<b>76</b>

**PART A  
INVITATION TO BID**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED (“DBSA”)**

BID NUMBER: RFP009/2022

DESCRIPTION:

**Appointment of a service provider to design and implement new websites for the IPP Office for a period of 36 months (3 years).**

NON-COMPULSORY BRIEFING: **24 January 2022 AT 10:00 AM**

**LINK REQUESTS: No** – Tender Submission Link requests will be accepted after **16h00 on the on the 26<sup>th</sup> of January 2022**. Any requests after the stipulated date and time will be disregarded.

CLOSING DATE: **31 January 2022**

CLOSING TIME: 23H55

---

**The successful Bidder will be required to conclude a service level agreement with the DBSA.**

---

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.

<b>NAME OF BIDDER AND EACH ENTITY IN CONSORTIUM:</b>				
<b>POSTAL ADDRESS:</b>				
<b>STREET ADDRESS:</b>				
<b>CONTACT PERSON (FULL NAME):</b>				
<b>EMAIL ADDRESS:</b>				
<b>TELEPHONE NUMBER:</b>				
<b>FAX NUMBER:</b>				
<b>BIDDER REGISTRATION NUMBER OR REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM</b>				
<b>BIDDER VAT REGISTRATION NUMBER OR VAT REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM</b>				
<b>BBBEE STATUS LEVEL VERIFICATION CERTIFICATE /BBBEE STATUS LEVEL SWORN AFFIDAVIT SUBMITTED?</b> [TICK APPLICABLE BOX]	YES		NO	
<b>IF YES, WHO ISSUED THE CERTIFICATE?</b>				
<b>REGISTERED WITH THE NATIONAL TREASURY CSD</b> [TICK APPLICABLE BOX]	YES		NO	
<b>CSD REGISTRATION NUMBER</b>				
<b>TAX COMPLIANCE STATUS PIN (TCS) NUMBER ISSUED BY SARS</b>				

1..1.1	ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No  [IF YES ENCLOSE PROOF]
1..1.2	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ANSWER PART B:3 BELOW ]
1..1.3	SIGNATURE OF BIDDER	.....
1..1.4	DATE	
1..1.5	FULL NAME OF AUTHORISED REPRESENTATIVE	
1..1.6	CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)	

## PART B

### TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>								
<p>1.1. BIDS MUST BE SUBMITTED ELECTRONICALLY (ONE DRIVE LINK) BY THE STIPULATED TIME TO THE LINK PROVIDED. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE</p> <p>1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p> <p>1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p> <p>1.5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.</p>								
<b>2. TAX COMPLIANCE REQUIREMENTS</b>								
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>								
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>								
<table style="width: 100%; border: none;"> <tr> <td style="width: 70%;">3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?</td> <td style="width: 30%; text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> <tr> <td>3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> <tr> <td>3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> <tr> <td>3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?</td> <td style="text-align: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</td> </tr> </table> <p><b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</b></p>	3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO	3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO	3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO							
3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO							
3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO							
3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO							

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

## PART C

### 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

**YES**      **NO**

☐☐

One original Bid document in separate folders; Folder 1 - for Pre-Qualifying Criteria and Functional Evaluation Folder 2 - Price / Financial Proposal –  
**Electronic submission**

☐☐

**Part A:** Invitation to Bid

☐☐

**Part B:** Terms and Conditions of Bidding

☐☐

**Part C:** Checklist of Compulsory Returnable Schedules and Documents

☐☐

**Part D:** Conditions of Tendering and Undertakings by Bidders

☐☐

**Part E: Specifications/Terms of Reference and Project Brief**

☐☐

**Annexure A:** Price Proposal Requirement

☐☐

**Annexure B:** SBD4 Declaration of Interest

☐☐

**Annexure C:** SBD6.1 and B-BBEE status level certificate

☐☐

**Annexure D:** SBD8: Declaration of Bidder's Past Supply Chain Practices

☐☐

**Annexure E:** SBD9: Certificate of Independent Bid Determination

☐☐

**Annexure F:** Certified copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure G:</b> Certified copies of latest share certificates, in case of a company.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure H: (if applicable):</b> A breakdown of how fees and work will be spread between members of the bidding consortium. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure I</b> Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria.             |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure J:</b> General Condition of Contract   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure K:</b> CSD Tax Compliance Status and Registration Requirements Report  |

## PART D

### CONDITIONS OF TENDERING 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 of contributor** means the B-BBEE status received by a measured entity based on its overall performance used to claim points in terms of regulation 6 and 7 of the Preferential Procurement Regulations, 2017.
- 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 4 (Bid Timetable) in Part C, by which Tenders must be received.
- 1.10 **DBSA** means the Development Bank of Southern Africa Limited.
- 1.11 **DFI** means Development Finance Institution.
- 1.12 **Evaluation Criteria** means the criteria set out under the clause 27 (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 27 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.

- 1.16 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000.
- 1.17 **PPPFA Regulations** means the Preferential Procurement Regulations, 2017 published in terms of the PPPFA.
- 1.18 **Pre-Qualifying Criteria** means the criteria set out in clause 27.3 of this Part C.
- 1.19 **Price and Preferential Points Assessment** means the process described in clause 27.2 of this Part C, as prescribed by the PPPFA.
- 1.20 **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.
- 1.21 **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 **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.
- 1.30 **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 TECHNICAL AND GENERAL QUERIES**

Queries pertaining to this tender must be directed to: -

DBSA Supply Chain Management Unit

Email: [VictorSCM@dbsa.org](mailto:VictorSCM@dbsa.org)

No questions will be answered telephonically.

#### 4. BID TIMETABLE

This timetable is provided as an indication of the timing of the tender process. It is indicative only and subject to change by the DBSA. Bidders are to provide proposals that will allow achievement of the intended commencement date.

Activity	Date
Advertisement of tender	11 / 01 / 2022
RFP document available	11 / 01 / 2022
NON-COMPULSORY BRIEFING SESSION	24 / 01 / 2022 at 10:00 am
Closing date for tender enquiries	31 / 01 / 2022
Link requests	26 / 01 / 2022 by 16h00
Closing date and time	31 / 01 / 2022 at 23H55
Intended completion of evaluation of tenders	TBA
Intended formal notification of successful Bidder(s)	TBA
Signing of Service Level Agreement	TBA
Effective date	TBA

#### 5. SUBMISSION OF TENDERS

**Instructions:**

- Bidders are required to issue Tender Submission Link requests and all other enquiries to [VictorSCM@dbsa.org](mailto:VictorSCM@dbsa.org) **ONLY**;
- **No** – Tender Submission Link requests will be accepted after **16h00 on the 26<sup>th</sup> of January 2022**. Any requests after the stipulated date and time will be disregarded.
- Bidders will thereafter receive a OneDrive Link to upload their tender submission documents electronically.

**NB: No Physical submission will be accepted for this bid. Bidders must ensure that they follow the instructions for the electronic submission.**

## **6. RULES GOVERNING THIS RFP AND THE TENDERING PROCESS**

- 6.1 Participation in the tender process is subject to compliance with the rules contained in this RFP Part C.
- 6.2 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.
- 6.3 All Bidders are deemed to accept the rules contained in this RFP Part C.
- 6.4 The rules contained in this RFP Part C apply to:
  - 6.4.1 The RFP and any other information given, received or made available in connection with this RFP, and any revisions or annexure;
  - 6.4.2 the Tendering Process; and
  - 6.4.3 any communications (including any briefings, presentations, meetings and negotiations) relating to the RFP or the Tendering Process.

## **7. STATUS OF REQUEST FOR PROPOSAL**

- 7.1 This RFP is an invitation for person(s) 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.

## **8. ACCURACY OF REQUEST FOR PROPOSAL**

- 8.1 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.
- 8.2 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).

- 8.3 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.

## **9. ADDITIONS AND AMENDMENTS TO THE RFP**

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

## **10. 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.

## **11. CONFIDENTIALITY**

- 11.1 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.

## **12. REQUESTS FOR CLARIFICATION OR FURTHER INFORMATION**

- 12.1 All communications relating to this RFP and the Tendering Process must be directed to the Tender Officer.
- 12.2 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 Officer in writing, and most preferably by e-mail to [VictorSCM@dbsa.org](mailto:VictorSCM@dbsa.org)
- 12.3 Any communication by a Bidder to the DBSA will be effective upon receipt by the Tender Officer (provided such communication is in the required format).
- 12.4 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.

- 12.5 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.
- 12.6 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).
- 12.7 A Bidder may, by notifying the Tender Officer 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.

### **13. UNAUTHORISED COMMUNICATIONS**

- 13.1 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 Officer. Nothing in this clause 13 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.
- 13.2 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.

### **14. IMPROPER ASSISTANCE, FRAUD AND CORRUPTION**

- 14.1 Bidders may not seek or obtain the assistance of employees of the DBSA in the preparation of their tender responses.
- 14.2 The DBSA may in its absolute discretion, immediately disqualify a Bidder that it believes has sought or obtained such improper assistance.
- 14.3 Bidders are to be familiar with the implications of contravening the Prevention and Combating of Corrupt Activities Act, 2004 and any other relevant legislation.

### **15. ANTI-COMPETITIVE CONDUCT**

- 15.1 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:
- 15.1.1 the preparation or lodgement of their Bid
  - 15.1.2 the evaluation and clarification of their Bid; and
  - 15.1.3 the conduct of negotiations with the DBSA.

- 15.2 For the purposes of this clause 15, 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.
- 15.3 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.

## **16. COMPLAINTS ABOUT THE TENDERING PROCESS**

- 16.1 Any complaint about the RFP or the Tendering Process must be submitted to the Supply Chain Management Unit in writing, by email, immediately upon the cause of the complaint arising or becoming known to the Bidder, ([VictorSCM@dbsa.org](mailto:VictorSCM@dbsa.org))
- 16.2 The written complaint must set out:
- 16.2.1 the basis for the complaint, specifying the issues involved;
  - 16.2.2 how the subject of the complaint affects the organisation or person making the complaint;
  - 16.2.3 any relevant background information; and
  - 16.2.4 the outcome desired by the person or organisation making the complaint.
- 16.3 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.

## **17. CONFLICT OF INTEREST**

- 17.1 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.
- 17.2 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.
- 17.3 The DBSA may immediately disqualify a Bidder from the Tendering Process if the Bidder fails to notify the DBSA of the conflict as required.

## **18. LATE BIDS**

- 18.1 Bids must be delivered by the Closing Time. The Closing Time may be extended by the DBSA in its absolute discretion by providing written notice to Bidders.
- 18.2 Bids delivered 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.
- 18.3 The determination of the DBSA as to the actual time that a Bid is lodged is final. Subject to clause 18.2, 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.

## **19. BIDDER'S RESPONSIBILITIES**

- 19.1 Bidders are responsible for:
- 19.1.1 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;
  - 19.1.2 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;
  - 19.1.3 ensuring that their Bids are accurate and complete;
  - 19.1.4 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;
  - 19.1.5 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
  - 19.1.6 submitting all Compulsory Documents.

- 19.2 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.
- 19.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy, or a sworn affidavit 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.
- 19.4 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.
- 19.5 Failure to provide the required information may result in disqualification of the Bidder.

## **20. PREPARATION OF BIDS**

- 20.1 Bidders must ensure that:
- 20.1.1 their Bid is submitted in the required format as stipulated in this RFP; and
  - 20.1.2 all the required information fields in the Bid are completed in full and contain the information requested by the DBSA.
- 20.2 The DBSA may in its absolute discretion reject a Bid that does not include the information requested or is not in the format required.
- 20.3 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.
- 20.4 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.
- 20.5 An incomplete Bid may be disqualified or assessed solely on the information completed or received with the Bid.

## **21. ILLEGIBLE CONTENT, ALTERATION AND ERASURES**

- 21.1 Incomplete Bids may be disqualified or evaluated solely on information contained in the Bid.
- 21.2 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.

- 21.3 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.

## **22. 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.

## **23. RESPONSIBILITY FOR BIDDING COSTS**

- 23.1 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.
- 23.2 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:
- 23.2.1 the Bidder is not engaged to perform under any contract; or
  - 23.2.2 the DBSA exercises any right under this RFP or at law.

## **24. DISCLOSURE OF BID CONTENTS AND BID INFORMATION**

- 24.1 All Bids received by the DBSA will be treated as confidential. The DBSA will not disclose contents of any Bid and Bid information, except:
- 24.1.1 as required by law;
  - 24.1.2 for the purpose of investigations by other government authorities having relevant jurisdiction;
  - 24.1.3 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.

## 25. USE OF BIDS

- 25.1 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.
- 25.2 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.

## 26. 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.

## 27. EVALUATION PROCESS

- 27.1 The Bids will be evaluated and adjudicated as follows:

### 27.1.1 First Stage – Test for administrative Responsiveness

The test for administrative responsiveness will include the following:

#### Stage 1: Responsiveness

The Tenderer should be able to provide all the relevant information required in the Supplier Information Form (SIF) which will include but not limited to;

**A. Tenderers who do not adhere to those criteria listed a PRE-QUALIFIER, will be disqualified immediately.**

Responsiveness Criteria		Prequalifying Criteria	Applicable to this Tender (Y/N)
1	Adherence to submitting Tender as a two-folder tender Folder 1 Functionality and returnable submission Folder 2 Pricing proposal submission	Pre-Qualifier	Y
2	In terms of the DBSA Transformation Imperative Targets, the DBSA will consider companies that are EME's and QSE's with a minimum B-BBEE status of Level 4 who will contribute to meaningful B-BBEE initiatives as part of the tender process.	Pre-Qualifier	Y

<b>3</b>	Proof of Registration with a recognized professional body/ institution, relevant to tender requirement (Microsoft Reseller Certified)	<b>Pre-Qualifier</b>	Y
<b>4</b>	Attendance Register of the Non-Compulsory Briefing Session attended by the Tenderer.	<b>Pre-Qualifier</b>	Y

**B.** Tenderers who do not adhere to the indicated response time for clarifications requested by the Employer will be deemed to be non-responsive and their submissions will not be evaluated further.

<b>Responsiveness Criteria</b>		<b>Clarification Time</b>	<b>Applicable to this Tender (Y/N)</b>
<b>5</b>	Standard conditions of tender as required.	48 hours	Y
<b>6</b>	Returnable documents completed and signed.	48 hours	Y
<b>7</b>	Submission of proof of registration with National Treasury Central Supplier Database (CSD) (provide summary report). Bidder/s must be registered and compliant with CSD in order to do business with the DBSA. Only applicable to SA-registered entities	72 Hours	Y
<b>8</b>	A valid and active Tax Compliance Status Pin issued by SARS.	48 hours	Y

Only those Bidders which satisfy all of the Pre-Qualifying Criteria will be eligible to participate in the Tendering Process further. Bids which do not satisfy all of the Pre-Qualifying Criteria will not be evaluated further.

#### **27.1.2 Second Stage – Functional criteria**

The Functional Criteria that will be used to test the capability of Bidders are as follows: 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. Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable.

Bidders will be assessed on the functional criteria set out in this RFP. Only those Bidders which pass the minimum threshold of **70 points** criteria will proceed to the next stage.

#### **27.1.3 Third Stage – price and preferential points**

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

27.1.3.2 The successful Bidder will be the Bidder that scores the highest number of points in the second stage of the Bid evaluation, unless the DBSA exercises its right to cancel the RFP, in line with the PPPFA Regulations.

**27.2 NB: Bidders are required to submit, as Annexure J to their Bids, any documentation which supports the responses provided in respect of the Eligibility Criteria below.**

### 27.3 Qualification: Pre-Qualifying Criteria

Only those Bidders which satisfy all of the Pre-Qualifying Criteria will be eligible to participate in the Tendering Process further. Bids which do not satisfy all of the Pre-Qualifying Criteria will not be evaluated further. Please refer to the table above

**Note: A tender that fails to meet any Pre-Qualifying Criteria stipulated herein in the tender documents is an unacceptable tender. Please refer to the table above**

### 27.4 Second Stage: Functional Evaluation Criteria

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

#### **Part 1 – Technical Evaluation and Scoring**

Evaluation Area	Evaluation Criteria	Matrix		Weighting	Supporting document provided YES/NO <sup>1</sup>	Supporting documentation found on Page <sup>2</sup> :
<b>Company Track Record and Experience</b>	Demonstrate at least 5 years' experience, and knowledge of website design and integration into MS Dynamics 365 or MS CRM. Three (3) references, to include company name, Scope of Work Done, Contact Person (and details) were similar assignments were completed successfully	<b>Years' Experience</b>	<b>Score</b>	<b>20</b>		
		More than 5 years' experience with three or more references submitted	<b>20</b>			
		Between 3-4 years' experience with three references submitted	<b>18</b>			
		Between 2-3 years' experience with two references submitted	<b>12</b>			
		Less than 2 years' experience with less than two references submitted	<b>0</b>			

	<p>Skills available, including MS Dynamics 365 certification of core team and demonstrated practical knowledge in:</p> <ul style="list-style-type: none"><li>• Web Design</li><li>• UI Design</li><li>• Web Integration with MS Dynamics 365</li></ul>	<table><tr><td>Poor (Score 0)</td><td>No MS Certification and / or less and the minimum of 3 years have not been met</td></tr><tr><td>Adequate (Score 5)</td><td>MS Certification and the minimum of 3 years relevant experience have been met</td></tr><tr><td>Good (Score 10)</td><td>MS Certification and the minimum of 3 years relevant experience have been exceeded</td></tr></table>	Poor (Score 0)	No MS Certification and / or less and the minimum of 3 years have not been met	Adequate (Score 5)	MS Certification and the minimum of 3 years relevant experience have been met	Good (Score 10)	MS Certification and the minimum of 3 years relevant experience have been exceeded	10											
Poor (Score 0)	No MS Certification and / or less and the minimum of 3 years have not been met																			
Adequate (Score 5)	MS Certification and the minimum of 3 years relevant experience have been met																			
Good (Score 10)	MS Certification and the minimum of 3 years relevant experience have been exceeded																			
Understanding of Scope	<p>Discuss in detail, the proposed Methodology, Approach, Deliverables, and Artefacts to address the in-scope requirements of this terms of Sprint 1 – 3 in the scope of work In section 5.</p> <p>Alignment to:</p> <ul style="list-style-type: none"><li>• CRM Upgrade path plan</li><li>• Website Integration</li><li>• Website update</li><li>• New Website deployment</li><li>• Training to IPPO Staff</li></ul>	<p>Provide a detailed write-up on the understanding and alignment of the scope of work in the terms of reference:</p> <table><tr><th>Approach</th><th>Score</th><th>Bidders Understanding of the SOW</th></tr><tr><td>No response</td><td>0</td><td></td></tr><tr><td>Poor</td><td>10</td><td>The approach plan or methodology is poor and not tailored to address the specific project objectives</td></tr><tr><td>Satisfactory</td><td>20</td><td>The approach plan or methodology is generic and not tailored to address the specific project objectives</td></tr><tr><td>Good</td><td>30</td><td>The approach plan or methodology is specific and tailored to address the specific project objectives</td></tr></table>	Approach	Score	Bidders Understanding of the SOW	No response	0		Poor	10	The approach plan or methodology is poor and not tailored to address the specific project objectives	Satisfactory	20	The approach plan or methodology is generic and not tailored to address the specific project objectives	Good	30	The approach plan or methodology is specific and tailored to address the specific project objectives	30		
Approach	Score	Bidders Understanding of the SOW																		
No response	0																			
Poor	10	The approach plan or methodology is poor and not tailored to address the specific project objectives																		
Satisfactory	20	The approach plan or methodology is generic and not tailored to address the specific project objectives																		
Good	30	The approach plan or methodology is specific and tailored to address the specific project objectives																		
SLA Offering for solution support		<table><tr><td>Poor (Score 0)</td><td>No SLA offering for solution support submitted</td></tr><tr><td>Good (Score 10)</td><td>Generic SLA offering for solution support submitted</td></tr><tr><td>Very Good (Score 20)</td><td>Detailed SLA offering for solution support submitted</td></tr></table>	Poor (Score 0)	No SLA offering for solution support submitted	Good (Score 10)	Generic SLA offering for solution support submitted	Very Good (Score 20)	Detailed SLA offering for solution support submitted	20											
Poor (Score 0)	No SLA offering for solution support submitted																			
Good (Score 10)	Generic SLA offering for solution support submitted																			
Very Good (Score 20)	Detailed SLA offering for solution support submitted																			
Total Weighting			80																	
Minimum of 60 must be achieved!																				

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

## Part 2 – Presentation Evaluation and Scoring

Evaluation Area	Evaluation Criteria		Weighting
Look and feel and layout of “wireframe” website	<b>Poor</b> (Score 0)	The consultant has little or has not demonstrated understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is not clear, including layout of website design, intranet and UI.	20
	<b>Adequate</b> (Score 5)	The consultant has demonstrated limited understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is poor, including layout of website design, intranet and UI.	
	<b>Good</b> (Score 10)	The consultant has sufficiently demonstrated understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is good, including layout of website design, intranet and UI.	
	<b>Very Good</b> (Score 20)	The consultant has an excellent understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is excellent, including layout of website design, intranet and UI.	
Show 4 previous client websites done	<b>Poor</b> (Score 0)	One or 0 previous client websites presented	20
	<b>Adequate</b> (Score 5)	Two previous client websites presented.	
	<b>Good</b> (Score 10)	Three previous client websites presented.	
	<b>Very Good</b> (Score 20)	Four previous client websites presented.	
Ease of use of backend updating/design/functionality	<b>Poor</b> (Score 0)	Complicated to update and limited functionality to update backend Website, Intranet and UI. The proposal includes a poor backend update methodology provided.	20
	<b>Good</b> (Score 10)	Easy to update with limited functionality to update backend Website, Intranet and UI. The proposal includes a standard backend update methodology provided.	
	<b>Very Good</b> (Score 20)	Easy to update with full functionality to update backend Website, Intranet and UI.	

		The proposal includes a comprehensive backend update methodology provided.	
Demonstrate Microsoft SharePoint & Microsoft CRM Dynamics integration	Poor (Score 0)	Proposed website design is unable to integrate with Microsoft SharePoint & Microsoft CRM Dynamics.	20
	Good (Score 10)	Proposed website design has limited ability to integrate with Microsoft SharePoint & Microsoft CRM Dynamics.	
	Very Good (Score 20)	Proposed website design is fully able to integrate with Microsoft SharePoint & Microsoft CRM Dynamics.	
Total Weighting			80
Minimum of 60 must be achieved!			

27.1 Bidders that passes functional criteria will qualify the Bid to move on to the second stage of evaluation, which is price and preferential point's evaluation. Bidders that do not pass the functional criteria will not be evaluated during the third stage of the evaluation.

## 27.2 **Third Stage: Price and Preferential Points Assessment**

27.2.1 the second 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

### 27.2.2 **Price points**

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

$$P_s = 80(1-(P_t - P_{min})/P_{min})$$

Where:

$P_s$  = Points scored for comparative price of tender or offer under consideration;

$P_t$  = Comparative price of tender or offer under consideration; and

$P_{min}$  = Comparative price of lowest acceptable tender or offer.

### 27.2.3 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:

B-BBEE Status Level	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

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.

### 27.2.4 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).

## 28. STATUS OF BID

28.1 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.

28.2 A Bid must not be conditional on:

- 28.2.1 the Board approval of the Bidder or any related governing body of the Bidder being obtained;
- 28.2.2 the Bidder conducting due diligence or any other form of enquiry or investigation;
- 28.2.3 the Bidder (or any other party) obtaining any regulatory approval or consent;
- 28.2.4 the Bidder obtaining the consent or approval of any third party; or

- 28.2.5 the Bidder stating that it wishes to discuss or negotiate any commercial terms of the contract.
- 28.3 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).
- 28.4 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.

## **29. CLARIFICATION OF BIDS**

- 29.1 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.
- 29.2 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.

## **30. DISCUSSION WITH BIDDERS**

- 30.1 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.
- 30.2 As part of the evaluation of this Bid, DBSA will invite Bidders to give a presentation to the DBSA in relation to their submissions.
- 30.3 The DBSA is under no obligation to undertake discussions with, and Bidders.
- 30.4 In addition to presentations and discussions, the DBSA may request some or all Bidders to:
- 30.4.1 conduct a site visit, if applicable;
  - 30.4.2 provide references or additional information; and/or
  - 30.4.3 make themselves available for panel interviews.

## **31. SUCCESSFUL BIDS**

- 31.1 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.
- 31.2 The DBSA may, in its absolute discretion, decide not to enter into pre-contractual negotiations with a successful Bidder.

- 31.3 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.

## **32. NO OBLIGATION TO ENTER INTO CONTRACT**

- 32.1 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.
- 32.2 The DBSA may conduct a debriefing session for all Bidders (successful and unsuccessful). Attendance at such debriefing session is optional.

## **33. BIDDER WARRANTIES**

- 33.1 By submitting a Bid, a Bidder warrants that:
- 33.1.1 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;
  - 33.1.2 it did not use the improper assistance of DBSA's employees or information unlawfully obtained from them in compiling its Bid;
  - 33.1.3 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;
  - 33.1.4 it accepts and will comply with the terms set out in this RFP; and
  - 33.1.5 it will provide additional information in a timely manner as requested by the DBSA to clarify any matters contained in the Bid.

## **34. DBSA'S RIGHTS**

- 34.1 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:
- 34.1.1 cease to proceed with, or suspend the Tendering Process prior to the execution of a formal written contract;

- 34.1.2 alter the structure and/or the timing of this RFP or the Tendering Process;
- 34.1.3 vary or extend any time or date specified in this RFP
- 34.1.4 terminate the participation of any Bidder or any other person in the Tendering Process;
- 34.1.5 require additional information or clarification from any Bidder or any other person;
- 34.1.6 provide additional information or clarification;
- 34.1.7 negotiate with any one or more Bidder;
- 34.1.8 call for new Bid;
- 34.1.9 reject any Bid received after the Closing Time; or
- 34.1.10 reject any Bid that does not comply with the requirements of this RFP.

### 35. GOVERNING LAWS

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

### 36. MANDATORY QUESTIONS

- 36.1 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 and the Bid may be disqualified.**

36.1.1

This Bid is subject to the General Conditions of Contract stipulated in this RFP document.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

36.1.2

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

### 36.1.3

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

### 36.1.4

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

### 36.1.5

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

### 36.1.6

In the case of Consortium, Joint Venture or subcontractors, all Bidders are required to provide mandatory documents as stipulated in Part C: Checklist of Compulsory Returnable Schedules and Documents of the Tender Document.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

### 36.1.7

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.8

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.9

By submitting a proposal in response to this RFP, the Bidders accept the evaluation criteria as it stands.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.10

Where applicable, the DBSA reserves the right to run benchmarks on the requirements equipment during the evaluation and after the evaluation.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.11

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.12

Only the solution commercially available at the proposal closing date shall be considered. No Bids for future solutions shall be accepted.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.13

<p>The Bidder should not qualify the proposal with own conditions.</p> <p><b>Caution:</b> 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.</p>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.14

<p>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.</p>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.15

<p>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.</p> <p>Such cancellation shall mean that the DBSA reserves the right to award the same proposal to next best Bidders as it deems fit.</p>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.16

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.17

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.18

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.19

<b>Bidders who make use of subcontractors:</b>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>
1. It is the responsibility of the Bidder to select competent subcontractors that meet all the tender requirements stipulated in this tender document.		
2. The Bidder shall be responsible for all due diligence of the selected subcontractors and will be held liable for any non-performance of the subcontractor.		
3. Bidders are required to provide documentation (such as BBBEE Certificate/Sworn Affidavit, Valid or Active Tax Compliance Status Pin Issued by SARS, CSD Summary Report, Valid or Active CIDB Certificate etc.) for the		

relevant subcontractor as a minimum in support of the subcontracting arrangement.		
4. Subcontracting must not contradict any Regulation or Legislation.		
5. 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.		

#### 36.1.20

All services supplied in accordance with this proposal must be certified to all legal requirements as per the South African law.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.21

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.22

<p>Evaluation of Bids shall be performed by an evaluation panel established by the DBSA.</p> <p>Bids shall be evaluated on the basis of conformance to the required specifications (functionality) as outlined in the RFP. For Bids considered for price and preference evaluation, 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 B-BBEE status level of contributor (according to the PPPFA Regulations) is 20.</p>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.23

If the successful Bidder disregards contractual specifications, this action may result in the termination of the contract.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.24

The Bidders' response to this Bid, or parts of the response, shall be included as a whole or by reference in the final contract.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.25

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.26

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.27

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.	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

## 36.1.28

<p>Tax Compliance Status either on CSD National Treasury Database or SARS eFiling System as a Condition for Appointment/Award of the Bid.</p> <p>This requirement is mandatory and has to be satisfied by the successful bidder. The successful bidder must be tax compliant prior to appointment/award of the bid as no bid will be awarded to persons who are not tax compliant.</p>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.29

<p>Company registration with CSD National Treasury Database as a Condition for Appointment/Award of the Bid.</p> <p>This requirement is mandatory and has to be satisfied by the successful bidder. The successful bidder must be registered on the CSD National Treasury site prior to appointment/award of the bid.</p>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

#### 36.1.30

<p><b>The following will be grounds for disqualification:</b></p> <ul style="list-style-type: none"> <li>Unsatisfactory performance under a previous public contract in the past 5 years, provided that</li> </ul>	<b>Comply/Accept</b>	<b>Do not comply/Do not accept</b>

<p>notice of such unsatisfactory performance has been given to the bidder; and/or</p> <ul style="list-style-type: none"> <li>• The bidder or any of its directors have committed a corrupt or fraudulent act in competing for the appointment; and/or</li> <li>• The bidder or any of its directors have been convicted of fraud or corruption in the last 5 years; and/or</li> <li>• The bidder or any of its directors have been listed in the Register for Tender Defaulters under section 9 of the Prevention and Combating of Corrupt Activities Act; and/or</li> <li>• Bids received after the stipulated closure time will be immediately disqualified; and/or</li> <li>• Bidders whom have recently completed or currently performing, or to commence work on specific categories of services may be excluded to enable the Bank manage its concentration risk. This threshold is currently set at R10 million for consultancy services.</li> </ul>		
---	--	--

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 E**

**TERMS OF REFERENCE & PROJECT BRIEF**

## 1. INTRODUCTION

The Department of Mineral Resources and Energy (DMRE), National Treasury (NT) and the Development Bank of Southern Africa (DBSA) established the IPP Office (IPPO) for the specific purpose of delivering on the Independent Power Producers Procurement Programme (IPPPP) and related interventions and mandates of the DMRE.

As part of the DBSA's ongoing support to the DMRE in terms of the Memorandum of Agreement (MoA), the DBSA is requested to assist the IPPO to appointment of a service provider to design and implement new websites for the IPPO for a period of 36 months (3 years).

## 2. PURPOSE

The intent of this Request for Proposal (RFP) is to search for suitable service provider to redesign, structure, develop and/or migrate the content of the IPPO websites, which will result in a refreshed look and feel and that incorporates best practice in terms of content management, structure, functionality, technology, user experience, visual design and website security.

The key objectives is:

- Upgrade current Microsoft CRM 2011 to MS Dynamics 365 (on premises), without losing current website functionality.
- Enhance the IPPO websites by updating the look and feel and functionality as per the scope of work, and therefore enhancing the brand and reputation of the IPPO
- Align the website to the IPPO values, specifically:
  - High Performance - delivering a quality, effective and efficient website.
  - Service Orientation - deliver a speedy and quality user experience to our clients over multiple different viewports
  - Innovation - improving the navigation and functionality by adopting best practice in website technology and relevant technological advancements to the benefit of users.
- Enable the use of better search engine optimization (SEO) that will result in increased reach, increased session durations and lower bounce rates

## 3. BACKGROUND

The IPP Office currently have 6 active websites domains. These websites are integrated into Microsoft CRM 2011 for:

- Web User access and document management control; and
- Website Content Management

The development and deployment of the websites will be based on sprints, for which the IPPO will request individual quotations from the service provider. The scope of work below contains the key sprints but does not limited any future scope of works to be requested for work on MS Dynamics 365 or the websites.

The solution should therefore be scalable, and the service provider will also have to manage the MS Dynamics 365 licensing on behalf of the IPPO on an annual basis accordingly.

## 4. SCOPE OF WORK

### 4.1. Project 1 – Upgrade of CRM

- The service provider will install, configure and deploy the latest version of Microsoft CRM Dynamics on the IPPO server following required upgrade paths.
- Setup both Test & Production environment.
- Migrate the existing database and website integration to the new MS Dynamics 365 Test & Production environment.
- Must have a documented backup and recovery process for entire solution.
- Automated website back up must be configured from the webserver to the MS Dynamics 365 server for inclusion of the Tape library and/or off-site backups.

### 4.2. Project 2 – Upgrade of current websites

The goal of the IPPO Website is to provide simple and intuitive electronic access to information, provide a platform for demonstration of projects, and help to market the company and to provide a channel for engaging with project developers, technology and finance partners.

#### 4.2.1. DESIGN REQUIREMENTS

The revamped design of external websites and implementation of an internal intranet site should accommodate the following:

- **Layout:** The new sites should not be visually crowded, attractively organized and structured in a manner that gives the user access to all the desired information at a glance. The sites must also be compatible with all major browsers.
- **Look and Feel:** Both sites should retain the unique look of the IPPO. This should enable the web user to recognize it as belonging to IPPO. In order to achieve brand consistency, everything visual should be inter-linked and linked back to the core brand look. The IPPO logo should be used in a consistent way across all the web/intranet pages.
- **Web Navigation Interface:** The service provider will be expected to ensure that the design of both sites is user friendly and easy to navigate. The design should anticipate and provide for different types of content. The sites content has to be organized into classifications and hierarchies.
- **Next Generation Responsiveness:** Both sites should allow websites flexibility to adjust according to the different devices the site is being accessed on.
- **Social Media Interfaces:** Both sites should allow integration of feeds from the social websites like Twitter, Instagram and face-book to allow for maximum interaction on the company social pages.
- **Access Control:** These sites should be designed in such a way to ensure that only the information to a particular user or user group is accessible. Posting capabilities should be limited only to IPPO's webmaster or authorised personnel. However, IPPO employees should be able to access the intranet, particularly when outside office via an external website. This functionality should prompt the end-user to have a recognisable username and password and utilise 2 factor authentication.

- **Search Capabilities:** An internal search engine for the website that searches the website with search results disaggregated according to key headers.
- **News Section:** News section should be incorporated into both sites' Content Management System with an archive system for old news.
- **News Feed:** The website should have the capability to receive RSS feeds (i.e. breaking news on energy articles and relevant government articles).
- **Newsletter:** The website should cater for electronic newsletter capability or compatibility.
- **Online Form & Database Application:** There should be built in functionality on the tenders and Careers pages to allow for online filling of forms.
- **Archive Section:** As appropriate, old news and other old articles should be moved to the Archives section of both sites. The service provider and the IPPO's webmaster shall agree on an archiving policy. All operations like searches and views should be available for archived information as well.
- **Emerging Media and Technologies:**
  - **Photo Gallery** – The IPPO sites should have dynamic photo galleries, these should possess some 2D viewing aspects and automatically resize photos to fit in the desired screen space allocated.
  - **Video** – Both sites should have a video library from which users can select and search for different video content the website has to offer. A page dedicated for this purpose should be developed.
  - **Podcast** – Both sites should have a provision for users to easily access podcasts.
- **External Website Links:** Provide links to other external websites as well as (e.g. the DMRE, NT & DBSA).

#### 4.2.2. END USER EXPERIENCE:

- Enhance the current look and feel to optimise navigation and experience
- Maintain a responsive design
- Site must be compatible with all major browsers and mobile devices.

#### 4.2.3. BACK-END USER EXPERIENCE:

- Update the archiving of documents and activities for audit purposes
- Maintain user logging and auditing
- Must have the ability to integrate into other corporate solutions in the future (e.g. MS SharePoint).

#### 4.2.4. ABILITY TO GENERATE REPORTS:

- These sites should be able to provide user statistics on different material available and the IPPO Administrator should be able to regulate the information displayed to public users.
- This information should be available for all downloads such as on the tender page and career pages etc.

#### 4.2.5. CONTENT MANAGEMENT FRAMEWORKS

A broad range of information should be accessible through the IPPO WEBSITE including, but not limited, to the following items:

Page/Section	Links & Description
Homepage	<ul style="list-style-type: none"> <li>• Company Profile</li> <li>• Glossary of terms</li> <li>• Search feature</li> <li>• Site map or index</li> </ul>

	<ul style="list-style-type: none"> <li>• Welcome statement</li> <li>• Frequently asked questions (FAQs)</li> <li>• History</li> <li>• Government Commitment – DMRE</li> <li>• Links to Strategic Partners websites</li> <li>• Live Feed banner from Social media platforms</li> <li>• Social Media links at bottom of page</li> </ul>
About Us	<ul style="list-style-type: none"> <li>• IPPO Overview – Brief overview with info on where &amp; how IPPO is linked to the Department of Energy, National Treasury and The DBSA.</li> <li>• Vision, Mission &amp; Values of IPPO</li> <li>• IPPO Group Structure (in future)</li> <li>• IPPO Executive Management Structure – pictures and profiles (in future)</li> <li>• IPPO Group Board of Directors – pictures and profiles (In future)</li> </ul>
News/Media Room	<p>This should be information repository. It should include the following:</p> <ul style="list-style-type: none"> <li>• Quarterly Reports &amp; Other Publications</li> <li>• Media articles released by IPPO filtered by technology groups etc.</li> </ul>
Projects	<p>It should include the following:</p> <ul style="list-style-type: none"> <li>• Interactive maps displaying currently projects on a Map</li> <li>• Project Database – Providing approved project information in a database format</li> </ul>
Tenders	<ul style="list-style-type: none"> <li>• Link for Current tenders advertised by IPPO</li> <li>• Link to the folder with the old tenders and Outcomes (up to 12 months)</li> </ul>
Vacancies	<ul style="list-style-type: none"> <li>• Link for vacancies advertised by IPPO</li> <li>• Link to the a folder with the old vacancies up to 12 months</li> </ul>
Contact Us	<ul style="list-style-type: none"> <li>• Contact Details of the IPP Office</li> <li>• A map to provide directions to the IPP Office.</li> <li>• An e-mail link for queries</li> </ul>

#### 4.2.6. SECURITY MEASURES

Security will have to be a primary focus during the development of these sites. This should ensure that the information on both sites is only accessible by the authorised personnel. A firewall should be configured to curb un-authorized access to especially the intranet. The service provider will have to ensure both sites include automated tools that are good for finding many common vulnerabilities against the websites.

The websites must be secure from cyber threats by external users at all times and therefore need to include features like CAPTCHA etc.

#### 4.2.7. HOSTING AND MAINTENANCE:

- The service provider will install, configure and deploy the website on the hosted server procured by the IPPO with a secure VPN back to the MS CRM server.
- Ensure that the IPPO ICT team knows how to check that the websites are always deployed and available.

- Major website maintenance must be conducted by the services provider every six (6) months
- Google Analytics must be embedded to provide rich insights into the traffic and effectiveness of the websites.
- Automated website back up must be configured on the server for compatibility with Tape library and/or off-site backups. The processes must be documented.

**4.2.8. RIGHTS TO BACK END ACCESS:**

- Training for the appointed content administrators to use the back end of the website.
- Ability and relevant rights to update content throughout website backend & MS Dynamics 365.

---

#### **4.3. Project 3 – Deploy New Project Website**

Replicate and adapt using an existing project website for a new technology programme to be launched by the IPPO including all MS Dynamics 365 integration to include (but not limited to):

- User Registration and verification, password reset
- Upload of proof of payments, whereby a user will be able to upload their POP with a one payment per project requirement
- Issue of receipts & user document access management.
- Website content to be managed in MS Dynamics 365 using existing functionality
- Separate press release section incorporated
- RFP/Briefing notes and other document distribution capability
- Queries (Cases in MS Dynamics 365)
- Responses via document uploads (if required)
- Replicate the conflict checklist process and updated if required.
- Replicate all reports and email templates

---

#### **4.4. Possible future Projects**

During the term of the SLA, the IPPO ICT unit may release other scopes of work to the service provider which will integrate into the website and MS Dynamics 365. Examples of these scopes of works can be:

- Integration into MS SharePoint
- Reporting Web Portal for existing projects on obligations
- Updates to the look and feel and functionality of the websites deployed
- Additional Project websites depending on the IPP Procurement Programme requirements.

## **5. SKILLS REQUIREMENTS**

The expertise required from successfully Service Provider inter alia are:

- Expert knowledge and experience in the implementation of projects of a similar nature in South Africa.
- Expert knowledge in Web Design
- Expert knowledge in UI Design
- Expert knowledge of Web Integration with MS Dynamics 365

## 6. TECHNICAL PROPOSAL

Each respondent is required to submit a proposal containing the following information:

- The envisaged approach and methodology of their offering and the service levels for supporting it.
- A detailed response to the scope of work as indicated under the expected deliverables.
- Include screenshots/sample of proposed look and feel of sites.
- Contactable references whom currently operate on similar infrastructure supplied by the Service Provider (References on your client's letterhead);
- Credentials of consultants that will be working on the project and capacity to support the solution (CV's of all working and supporting the solution and their roles).
- Partner Certification from Microsoft on MS Dynamics 365.
- Indicate how they will ensure effective project management during installation and commissioning time.
- Provide a project plan indicating the estimated time required for completion and delivery.
- Assign an experienced Account Manager (please provide CV).
- Indicate how they will ensure effective account management and provide query resolution process including response time and resolution time during 3 years of support.
- Solution Support for a period of 3 years. The following are important requirements for the support contract for the IPPO:
  - Internet website design including User Experience & User Interface (UX/UI).
  - Development, configuration and implementation of enhancement, changes and implementation of new functionality.
- Training , Knowledge Transfer and Change Management
  - Provide training and knowledge transfer (for supporting the environment to the IPPO ICT).
  - Provide approach and plan to change management.

**Tenderers will be required to do an onsite demonstration/presentation upon being shortlisted to demonstrate their understanding of the scope of works.**

**NB: do not include the price in the technical evaluation proposal!**

## 7. FEE PROPOSAL

PRICING

- Cost must be VAT inclusive and quoted in South African Rand.
- Financial proposal should include the cost of delivery.
- Service providers must quote for all the items as indicated on the scope of work.

Item	Description	Total Cost (incl Vat)
<b>4.1. PROJECT 1 – UPGRADE OF CRM</b>		
4.1.1	Project kick-off	
4.1.2	Planning	
4.1.3	Implementation	
4.1.4	Stabilisation	
4.1.5	End User Training	
4.1.6	Deployment	
4.1.7	Handover	
4.1.8	Post Implementation Support	
4.1.9	Project Close Out	
<b>4.2. PROJECT 2 – UPGRADE OF CURRENT WEBSITES</b>		
4.2.1	Project kick-off	
4.2.2	Planning	
4.2.3	Implementation	
4.2.4	Stabilisation	
4.2.5	End User Training	
4.2.6	Deployment	
4.2.7	Handover	
4.2.8	Post Implementation Support	

4.2.9	Project Close Out	
<b>4.3. PROJECT 3 – DEPLOY NEW PROJECT WEBSITE</b>		
4.3.1	Project kick-off	
4.3.2	Planning	
4.3.3	Implementation	
4.3.4	Stabilisation	
4.3.5	End User Training	
4.3.6	Deployment	
4.3.7	Handover	
4.3.8	Post Implementation Support	
4.3.9	Project Close Out	
<b>TOTAL COST (Including Vat)</b>		

## 8. EVALUATION CRITERIA

The evaluation will be split into two parts:

1. Technical Evaluation based on the overall response to the scope of work submitted; and
2. A presentation of the proposed solution & website design.

---

### 8.1. Part 1 - Technical Evaluation and Scoring

Only those Bidders which score [60] points or higher (out of a possible 75%) during the functional evaluation will be evaluated during the second stage of the Bid.

Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable.

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

Evaluation Area	Evaluation Criteria	Matrix			Weighting	Supporting document provided YES/NO <sup>1</sup>	Supporting documentation found on Page <sup>2</sup> :
Company Track Record and Experience	Demonstrate at least 5 years' experience, and knowledge of website design and integration into MS Dynamics 365 or MS CRM. Three (3) references, to include company name, Scope of Work Done, Contact Person (and details) were similar assignments were completed successfully	Years' Experience		Score	20		
		More than 5 years' experience with three or more references submitted		20			
		Between 3-4 years' experience with three references submitted		18			
		Between 2-3 years' experience with two references submitted		12			
		Less than 2 years' experience with less than two references submitted		0			
	Skills available, including MS Dynamics 365 certification of core team and demonstrated practical knowledge in:  • Web Design • UI Design • Web Integration with MS Dynamics 365				10		
		Poor (Score 0)	No MS Certification and / or less and the minimum of 3 years have not been met				
		Adequate (Score 5)	MS Certification and the minimum of 3 years relevant experience have been met				
		Good (Score 10)	MS Certification and the minimum of 3 years relevant experience have been exceeded				

Understanding of Scope	Discuss in detail, the proposed Methodology, Approach, Deliverables, and Artefacts to address the in-scope requirements of this terms of Sprint 1 – 3 in the scope of work In section 5. Alignment to: <ul style="list-style-type: none"><li>• CRM Upgrade path plan</li><li>• Website Integration</li><li>• Website update</li><li>• New Website deployment</li><li>• Training to IPPO Staff</li></ul>	Provide a detailed write-up on the understanding and alignment of the scope of work in the terms of reference: <table><tr><th>Approach</th><th>Score</th><th>Bidders Understanding of the SOW</th></tr><tr><td>No response</td><td>0</td><td></td></tr><tr><td>Poor</td><td>10</td><td>The approach plan or methodology is poor and not tailored to address the specific project objectives</td></tr><tr><td>Satisfactory</td><td>20</td><td>The approach plan or methodology is generic and not tailored to address the specific project objectives</td></tr><tr><td>Good</td><td>30</td><td>The approach plan or methodology is specific and tailored to address the specific project objectives</td></tr></table>	Approach	Score	Bidders Understanding of the SOW	No response	0		Poor	10	The approach plan or methodology is poor and not tailored to address the specific project objectives	Satisfactory	20	The approach plan or methodology is generic and not tailored to address the specific project objectives	Good	30	The approach plan or methodology is specific and tailored to address the specific project objectives	30		
			Approach	Score	Bidders Understanding of the SOW															
			No response	0																
			Poor	10	The approach plan or methodology is poor and not tailored to address the specific project objectives															
			Satisfactory	20	The approach plan or methodology is generic and not tailored to address the specific project objectives															
			Good	30	The approach plan or methodology is specific and tailored to address the specific project objectives															
SLA Offering for solution support		<table><tr><td>Poor (Score 0)</td><td>No SLA offering for solution support submitted</td></tr><tr><td>Good (Score 10)</td><td>Generic SLA offering for solution support submitted</td></tr><tr><td>Very Good (Score 20)</td><td>Detailed SLA offering for solution support submitted</td></tr></table>	Poor (Score 0)	No SLA offering for solution support submitted	Good (Score 10)	Generic SLA offering for solution support submitted	Very Good (Score 20)	Detailed SLA offering for solution support submitted	20											
		Poor (Score 0)	No SLA offering for solution support submitted																	
		Good (Score 10)	Generic SLA offering for solution support submitted																	
		Very Good (Score 20)	Detailed SLA offering for solution support submitted																	
Total Weighting			80																	
Minimum of 60 must be achieved!																				

**Note:**

1. Supporting documents provided **YES/NO:**

Please indicate if the supporting documentation has been provided or not.

2. Supporting Documentation found on page:

Please insert where the supporting documentation can be found within the submission.

## 8.2. Part 2 - Presentation Evaluation and Scoring

Only those Bidders which score [60] points or higher (out of a possible 80) during the functional evaluation will be evaluated during the second stage of the Bid.

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

Evaluation Area	Evaluation Criteria		Weighting
Look and feel and layout of “wireframe” website	<b>Poor</b> (Score 0)	The consultant has little or has not demonstrated understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is not clear, including layout of website design, intranet and UI.	20
	<b>Adequate</b> (Score 5)	The consultant has demonstrated limited understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is poor, including layout of website design, intranet and UI.	
	<b>Good</b> (Score 10)	The consultant has sufficiently demonstrated understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is good, including layout of website design, intranet and UI.	
	<b>Very Good</b> (Score 20)	The consultant has an excellent understanding of the layout of the website design, intranet and UI. Applicability of the “wireframe” is excellent, including layout of website design, intranet and UI.	
Show 4 previous client websites done	<b>Poor</b> (Score 0)	One or 0 previous client websites presented	20
	<b>Adequate</b> (Score 5)	Two previous client websites presented.	
	<b>Good</b> (Score 10)	Three previous client websites presented.	
	<b>Very Good</b> (Score 20)	Four previous client websites presented.	
Ease of use of backend updating/design/functionality	<b>Poor</b> (Score 0)	Complicated to update and limited functionality to update backend Website, Intranet and UI. The proposal includes a poor backend update methodology provided.	20
	<b>Good</b> (Score 10)	Easy to update with limited functionality to update backend Website, Intranet and UI. The proposal includes a standard backend update methodology provided.	
	<b>Very Good</b> (Score 20)	Easy to update with full functionality to update backend Website, Intranet and UI. The proposal includes a comprehensive backend update methodology provided.	

<b>Demonstrate Microsoft SharePoint &amp; Microsoft CRM Dynamics integration</b>			<b>20</b>
	<b>Poor</b> (Score 0)	Proposed website design is unable to integrate with Microsoft SharePoint & Microsoft CRM Dynamics.	
	<b>Good</b> (Score 10)	Proposed website design has limited ability to integrate with Microsoft SharePoint & Microsoft CRM Dynamics.	
	<b>Very Good</b> (Score 20)	Proposed website design is fully able to integrate with Microsoft SharePoint & Microsoft CRM Dynamics.	
<b>Total Weighting</b>			<b>80</b>
<b>Minimum of 60 must be achieved!</b>			

## 9. DELIVERABLE ACCEPTANCE CRITERIA

Deliverables will only be paid once accepted by the IPP Office. The following deliverable acceptance criteria will apply prior to accepting a deliverable as final:

### Annexure A

#### Fees and Assumptions

#### FORM OF OFFER AND ACCEPTANCE (AGREEMENT)

#### FORM OF OFFER

#### THE CONSULTANT IS TO COMPLETE AND SIGN THE FORM OF OFFER

The Employer, identified in the Acceptance signature block, has solicited offers to enter into a contract in respect of the following services:

**RFP009/2022: Appointment of a service provider to design and implement new websites for the IPP Office for a period of 36 months (3 years).**

By the representative of the Tenderer, deemed to be duly authorised, signing this part of this Form of Offer and Acceptance, the Tenderer offers to perform all of the obligations and liabilities of the consultant under the Contract including compliance with all its terms and conditions according to their true intent and meaning for an amount to be determined in accordance with the Conditions of Contract identified in the Contract Data.

(in words);                      ZAR                      (in figures),

**Signature(s)**

**Name(s)**

## Capacity

For the  
*Tenderer*

---

(Name and address of organisation)

Name \_\_\_\_\_ and \_\_\_\_\_  
signature \_\_\_\_\_ of \_\_\_\_\_  
witness \_\_\_\_\_ Date \_\_\_\_\_

## Annexure A - Pricing fee breakdown

Item	Description	Total Cost (incl Vat)
<b>4.1.PROJECT 1 – UPGRADE OF CRM</b>		
4.1.1	Project kick-off	
4.1.2	Planning	
4.1.3	Implementation	
4.1.4	Stabilisation	
4.1.5	End User Training	
4.1.6	Deployment	
4.1.7	Handover	
4.1.8	Post Implementation Support	
4.1.9	Project Close Out	
<b>4.2.PROJECT 2 – UPGRADE OF CURRENT WEBSITES</b>		
4.2.1	Project kick-off	
4.2.2	Planning	
4.2.3	Implementation	
4.2.4	Stabilisation	
4.2.5	End User Training	
4.2.6	Deployment	
4.2.7	Handover	
4.2.8	Post Implementation Support	

4.2.9	Project Close Out	
<b>4.3.PROJECT 3 – DEPLOY NEW PROJECT WEBSITE</b>		
4.3.1	Project kick-off	
4.3.2	Planning	
4.3.3	Implementation	
4.3.4	Stabilisation	
4.3.5	End User Training	
4.3.6	Deployment	
4.3.7	Handover	
4.3.8	Post Implementation Support	
4.3.9	Project Close Out	
<b>TOTAL COST (Including Vat)</b>		

**DECLARATION OF INTEREST**

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

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

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

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

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

2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....

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

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

2.6 VAT Registration Number: .....

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

<sup>1</sup>"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.

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

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

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member: .....

Name of state institution at which you or the person  
connected to the bidder is employed : .....

Position occupied in the state institution: .....

Any other particulars:

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

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

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

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

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

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

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

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have **YES / NO**  
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?

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, **YES/NO**  
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?

2.10.1 If so, furnish particulars.

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

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

2.11.1 If so, furnish particulars:

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

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

<b>Full Name</b>	<b>Identity Number</b>	<b>Personal Tax Reference Number</b>	<b>State Number / Employee Persal Number</b>

**4. DECLARATION**

I, THE UNDERSIGNED (NAME).....

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

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

**1..1.7**

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

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

**1. GENERAL CONDITIONS**

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

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

1.2

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

1.3 Points for this bid shall be awarded for:

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

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTION	20
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

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

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

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

## 3. POINTS AWARDED FOR PRICE

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

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

<b>80/20</b>	<b>or</b>	<b>90/10</b>
$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	or	$P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$

Where

- $P_s$  = Points scored for price of bid under consideration
- $P_t$  = Price of bid under consideration
- $P_{\min}$  = Price of lowest acceptable bid

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

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

B-BBEE Status Level of Contributor	Number of points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

#### 5. BID DECLARATION

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

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

- 6.1 B-BBEE Status Level of Contributor: = .....(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

#### 7. SUB-CONTRACTING

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

(*Tick applicable box*)

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

- 7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(*Tick applicable box*)

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

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

**Designated Group: An EME or QSE which is at last 51% owned by:**

**EME**

**QSE**

√

√

Black people

Black people who are youth

Black people who are women

Black people with disabilities

Black people living in rural or underdeveloped areas or townships

Cooperative owned by black people

Black people who are military veterans

**OR**

Any EME

Any QSE

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

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

**8.4 TYPE OF COMPANY/ FIRM**

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

[TICK APPLICABLE BOX]

**8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

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

**8.6 COMPANY CLASSIFICATION**

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

[TICK APPLICABLE BOX]

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

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

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

WITNESSES

1. ....

2. ....

.....  
SIGNATURE(S) OF BIDDERS(S)

DATE:.....

ADDRESS.....

.....

.....

## 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.**

Item	Question	Yes	No
4.1	<p><b>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?</b></p> <p>(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 <i>audi alteram partem</i> rule was applied).</p> <p><b>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.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>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)?</p> <p><b>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.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

4.3.1	If so, furnish particulars:		
4.4	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?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

**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**

.....  
**Position**

.....  
**Name of Bidder**

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

- 1 This Standard Bidding Document (SBD) must form part of all bids<sup>1</sup> 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).<sup>2</sup> 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:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> 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<sup>3</sup> 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.

<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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.

.....  
SignatureDate

.....  
Position Name of Bidder

## **Annexure F**

**Bidders are required to include, as Annexure F to their Bids, certified copies of all relevant CIPC registration documents listing all members with percentages, in the case of a close corporation**

## **Annexure G**

**Bidders are required, as annexure G to their Bids, to submit certified copies of the latest share certificates of all relevant companies**

## **Annexure H**

**Bidders which submit Bids as an unincorporated joint venture, consortium or other association of persons are required to submit, as Annexure H, a breakdown of how the percentage (%) fees and work will be split between the various people or entities which constitute the Bidder.**

## **Annexure I**

**Bidders are required to include, as Annexure I to their Bids, supporting documents to their responses to the Pre- Qualifying Criteria and Evaluation Criteria.**

**Where the supporting document is the profile of a member of the Bidder's proposed team, this should be indicated.**

## Annexure J

### [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:

Item	YES	NO
Is the Bidder familiar with the General Conditions of Contract prescribed by the National Treasury?		

## **Annexure K**

### **Tax Compliant Status and CSD Registration Requirements**

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

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

**CSD Registration Number:**



The Development Bank of Southern Africa has a Zero Tolerance on Fraud and Corruption. Report any incidents of Fraud and Corruption to Whistle Blowers on any of the following:

TollFree : 0800 20 49 33  
Email : [dbsa@whistleblowing.co.za](mailto:dbsa@whistleblowing.co.za)  
Free Post : Free Post KZN 665 | Musgrave | 4062  
SMS : 33490