REQUEST FOR QUOTATION

YOU ARE HEREBY INVITED TO SUBMIT QUOTATIONS FOR THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED

<table>
<thead>
<tr>
<th>BID NUMBER:</th>
<th>RFQ074/2022</th>
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</thead>
<tbody>
<tr>
<td>RFQ ISSUE DATE:</td>
<td>WEDNESDAY, 03 AUGUST 2022</td>
</tr>
<tr>
<td>CLOSING DATE AND TIME:</td>
<td>WEDNESDAY, 17 AUGUST 2022</td>
</tr>
<tr>
<td>RFQ VALIDITY PERIOD</td>
<td>90 DAYS</td>
</tr>
<tr>
<td>DESCRIPTION</td>
<td>SOURCING OF PROFESSIONAL SERVICE PROVIDER (PSP) TO FACILITATE THE MANAGEMENT AND BOARD STRATEGIC PLANNING SESSIONS FOR THE DEVELOPMENT BANK OF SOUTHERN AFRICA (DBSA)</td>
</tr>
</tbody>
</table>
| ELECTRONIC BID SUBMISSIONS | 1. Bidders are advised to request submission link and all other enquiries to davidn2@dbsa.org – ONLY  
2. No tender submission link requests and any queries will be accepted after **16h00 on the 15 AUGUST 2022**. Any requests after the stipulated date and time will be disregarded.  
3. Bidders will thereafter receive a OneDrive Link to upload their tender submission documents electronically.  
4. Bidders who have received submission Links that have errors, will be provided with new Links for use. |
| TENDER TECHNICAL AND GENERAL QUERIES | E-mail address: davidn2@dbsa.org |
| COMPLAINTS ABOUT THIS RFQ OR TENDER PROCESS | E-mail address: scmqueries@dbsa.org |

Bidders must acknowledge receipt of this RFQ on the above contact details. NB: All enquiries regarding this RFQ must be forwarded to the stated email address above within the day after the RFQ has been issued. No enquiries from bidders will be entertained after the closing date of this RFQ and during the subsequent evaluation processes. DBSA however reserves the right to clarify any information with any bidder regarding their response to this RFQ. All responses must be submitted to the above-mentioned address at the time specified.
# Supplier Information

<table>
<thead>
<tr>
<th>Name of Bidder</th>
<th>Postal Address</th>
<th>Street Address</th>
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<tr>
<th>Telephone Number</th>
<th>Code</th>
<th>Number</th>
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<th>Cellphone Number</th>
<th>Code</th>
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<th>Facsimile Number</th>
<th>Code</th>
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<tr>
<th>E-mail Address</th>
<th>VAT Registration Number</th>
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<thead>
<tr>
<th>Supplier Compliance Status</th>
<th>Tax Compliance System PIN:</th>
<th>Or</th>
<th>Central Supplier Database No:</th>
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<tr>
<td></td>
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<td></td>
<td>MAAA</td>
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<tr>
<th>Original and Valid B-BBEE Status Level Verification Certificate OR Original Certified Copy</th>
<th>Tick Applicable Box</th>
<th>Original B-BBEE Status Level Sworn Affidavit</th>
<th>Tick Applicable Box</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
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</table>

**Questionnaire to Bidding Foreign Suppliers Please Complete as per Section 3 of the Terms and Conditions Below**

Are You the Accredited Representative in South Africa for the Goods /Services /Works Offered?  
☐ Yes  ☐ No  

Are You a Foreign Based Supplier for the Goods / Services / Works Offered?  
☐ Yes  ☐ No  

[If Yes, Answer the Questionnaire Below]
## TERMS AND CONDITIONS FOR BIDDING

### 1. RFQ SUBMISSION

1.1. BIDS MUST BE SUBMITTED VIA ONE DRIVE LINK. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.

1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR ONLINE.

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

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

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

1.6. THE SUCCESSFUL BIDDER MAY BE REQUIRED TO CONCLUDE A FORMAL WRITTEN CONTRACT WITH THE DBSA DEPENDING ON THE NATURE OF THE SERVICES TENDERED FOR.

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

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

1.9. LATE AND INCOMPLETE SUBMISSIONS WILL NOT BE ACCEPTED.

1.10. ANY BIDDER WHO HAS REASONS TO BELIEVE THAT THE RFQ SPECIFICATION IS BASED ON ANY SPECIFIC BRAND MUST INFORM DBSA IN WRITING BEFORE THE RFQ CLOSING DATE. IT SHOULD HOWEVER, BE NOTED THAT DBSA RESERVES THE RIGHT TO ISSUE BRAND SPECIFIC SPECIFICATIONS “EQUIVALENT” / REQUIREMENTS TENDER.

1.11. BIDDERS ARE REQUIRED TO COMPLETE ANNEXURE B FOR ALL PRICE QUOTATIONS EXCEEDING THE VALUE OF R30 000 (VAT INCLUDED) AND ATTACH TO THE FUNCTIONAL/TECHNICAL PROPOSAL WHERE THE TENDERING PROCESS WILL USE A ONE ENVELOPE SYSTEM.
1.12. Bidders are also required to complete and sign all declarations as part of the RFQ documentation pack the standard bidding documents (SBD) prescribed by the National Treasury attached as Annexure C.

1.13. The successful bidder will be the bidder that scores the highest number of points in the price and preference evaluation, unless the DBSA exercises its right to cancel the RFP, in line with the preferential procurement regulations, 2017.

1.14. All prices must be quoted in South African Rand (ZAR)

1.15. The cost of marketing and advertising, and other charges must be included in the total price quoted, if these items are requested as part of the DBSA cost template / model of this RFQ. Bidders should under no circumstances include any additional cost elements which have not specifically been requested for as part of this RFQ. If additional items are suggested by any bidder, then these items must be separately specified with a clear motivation of why these additional items may be required. It should also be further stated whether the workability of the solution proposed is dependent on such additional items or not.

1.16. Bidders are also requested to separately provide a detailed cost breakdown of all items to be provided as part of their response to this RFQ, which clearly depicts the item description (brand name, product code) and associated quantities. Failure to provide this information will invalidate the RFQ response on the basis of incompleteness. The total cost of the RFQ response based on the DBSA cost template / model should exactly match the total cost of the detailed cost breakdown. In the event of any discrepancies, then the higher amount of the 2 documents will be used as basis for the price evaluations of this RFQ response.

2. TAX COMPLIANCE REQUIREMENTS

2.1 Bidders must ensure compliance with their tax obligations.

2.2 Bidders are required to submit their unique personal identification number (PIN) issued by SARS to enable the organ of state to view the taxpayer’s profile and tax status.

2.3 Application for tax compliance status (TCS) or PIN may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as e-filers through the website www.sars.gov.za.

2.4 Bidders may also submit a printed TCS together with the bid.

2.5 In bids where consortia / joint ventures / sub-contractors are involved; each party must submit a separate proof of TCS / PIN / CSD number.

2.6 Where no TCS is available but the bidder is registered on the central supplier database (CSD), a CSD number must be provided.

2.7 No bids will be considered from persons in the service of the state, companies with directors who are persons in the service of the state, or close corporations with members persons in the service of the state.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  □ YES □ NO
3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?  □ YES □ NO
2.8 DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  □ YES □ NO
3.1. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?  □ YES □ NO

IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

4. COMPLIANCE REQUIREMENTS

4.1 All bidder must submit their original and valid BBBEE status level verification certificate or original certified copy or original sworn affidavit thereof, substantiating their BBBEE status.
4.2 The submission of such certificates must comply with the requirements of instructions and guidelines issued by the National Treasury and must be in accordance with the applicable notices published by the Department of Trade and Industry in the Government Gazette.

5. PRE-QUALIFICATION CRITERIA

5.1 The following pre-qualifying criteria will be applied, bidders who do not meet all of the pre-qualifying criteria will not be evaluated further:

<table>
<thead>
<tr>
<th>Responsiveness Criteria</th>
<th>Prequalifying Criteria</th>
<th>Applicable to this Tender (Y/N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Adherence in submitting Tender as two stage folder (Folder 1 - Functionality &amp; Folder 2 - Price proposal)</td>
<td>Pre-Qualifier</td>
<td>Y</td>
</tr>
<tr>
<td>2  Attendance register for Compulsory Briefing session.</td>
<td>Pre-Qualifier</td>
<td>N/A</td>
</tr>
<tr>
<td>3  Proof of Registration with a recognized professional body/institution, relevant to tender requirement</td>
<td>Pre-Qualifier</td>
<td>N</td>
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<tr>
<td>4  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 2 who will contribute to meaningful B-BBEE initiatives as part of the tender process</td>
<td>Pre-Qualifier</td>
<td>Y</td>
</tr>
<tr>
<td>5  The successful Tenderer, if not itself an EME or QSE with a minimum B-BBEE status level 2, as per Section 4(1)(a) and (b) of the PPR 2017, must subcontract a minimum of 30% of the value of the contract to the following category referred to in Section 4(1)(c) of the PPR 2017: (i) an EME or QSE which is at least 51% owned by black people.</td>
<td>Pre-Qualifier</td>
<td>Y</td>
</tr>
</tbody>
</table>
6. FUNCTIONAL EVALUATION

Refer to page 13 to 15 for detailed functional evaluation criteria

7. PRICE AND PREFERENCE EVALUATION

7.1 THIS RFQ WILL BE EVALUATED IN TERMS OF THE 80/20 PREFERENCE POINT SYSTEM PRESCRIBED BY THE PREFERENTIAL PROCUREMENT REGULATIONS 2017 AS AMENDED. THE ALLOCATION OF POINTS WILL BE AS FOLLOWS:

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

8. ORAL PRESENTATIONS

8.1 BIDDERS WHO SUBMIT BIDS IN RESPONSE TO THIS RFQ MAY BE REQUIRED TO GIVE AN ORAL PRESENTATION, WHICH MAY INCLUDE, BUT IS NOT LIMITED TO, A MARKETING PROPOSAL DEMONSTRATION OF THEIR PROPOSAL TO DBSA. THIS PROVIDES AN OPPORTUNITY FOR THE BIDDER TO CLARIFY OR ELABORATE ON THEIR PROPOSAL. THIS IS A FACT FINDING AND EXPLANATION SESSION ONLY AND DOES NOT INCLUDE NEGOTIATION. DBSA SHALL SCHEDULE THE TIME AND LOCATION OF THESE PRESENTATIONS.

8.2 ORAL PRESENTATIONS ARE AN OPTION OF DBSA AND MAY OR MAY NOT BE CONDUCTED. IF SUCH PRESENTATIONS OR PRODUCT DEMONSTRATIONS ARE REQUIRED, THEN THE COST TO SET UP THESE SESSIONS WILL BE BORNE BY THE BIDDER. IT SHOULD ALSO BE NOTED THAT WHERE A BIDDER CAN ONLY FACILITATE SUCH PRESENTATION AND DEMONSTRATION SESSIONS ABROAD OR EVEN BEYOND THE PROVINCIAL BORDERS OF GAUTENG, THEN ANY ASSOCIATED SUBSISTENCE AND TRAVELING COST OF THE DBSA BID EVALUATION TEAM, WILL BE FOR THE ACCOUNT OF THE BIDDER.

9. REASONS FOR DISQUALIFICATION

9.1 DBSA RESERVES THE RIGHT TO DISQUALIFY ANY BIDDER WHICH DOES ANY ONE OR MORE OF THE FOLLOWING:

9.1.1 BIDDERS WHO SUBMITTED INCOMPLETE INFORMATION AND DOCUMENTATION ACCORDING TO THE REQUIREMENTS OF THIS RFQ;
9.1.2 BIDDERS WHO SUBMITTED INFORMATION THAT IS FRAUDULENT, FACTUALLY UNTRUE OR INACCURATE, FOR EXAMPLE MEMBERSHIPS THAT DO NOT EXIST, BEE CREDENTIALS, EXPERIENCE, ETC.;
9.1.3 BIDDERS WHO RECEIVED INFORMATION NOT AVAILABLE TO OTHER VENDORS THROUGH FRAUDULENT MEANS; AND/OR
9.1.4 BIDDERS WHO DO NOT COMPLY WITH ANY OTHER REQUIREMENTS AS STIPULATED IN THIS RFQ DOCUMENT.
9.1.5 BIDDERS WHO SUBMIT RESPONSE AFTER THE STIPULATED SUBMISSION DATE AND TIME.

10. RIGHT TO CANCEL

DBSA RESERVES THE RIGHT TO CANCEL OR REJECT ANY QUOTE AND NOT TO AWARD THE RFQ TO THE LOWEST BIDDER OR AWARD PARTS OF THE RFQ TO DIFFERENT BIDDERS, OR NOT TO AWARD THE RFQ AT ALL.

11. DECLARATION BY BIDDER

I, THE UNDERSIGNED (NAME)…………………………………………………………………………………………………………………….CERTIFY THAT:

i. I HAVE READ, UNDERSTOOD AND UNCONDITIONALLY ACCEPT THE CONDITIONS OF THIS RFQ.
ii. I HAVE SUPPLIED THE REQUIRED INFORMATION AND THE INFORMATION SUBMITTED AS PART OF THIS RFQ IS TRUE AND CORRECT.
SIGNATURE OF BIDDER
CAPACITY UNDER WHICH THIS BID IS SIGNED:

(PROOF OF AUTHORITY MUST BE SUBMITTED E.G. COMPANY RESOLUTION)

DATE: ..................................................
TERMS OF REFERENCE (TOR)

SOURCING OF PROFESSIONAL SERVICE PROVIDER (PSP)
TO FACILITATE THE MANAGEMENT AND BOARD STRATEGIC PLANNING
SESSIONS FOR THE DEVELOPMENT BANK OF SOUTHERN AFRICA (DBSA)

29 July 2022
1. CONTEXT

The Development Bank of Southern Africa (DBSA) is one of several Development Finance Institutions (DFIs) established by the South African government, to catalyse development impact and growth through investment in both economic and social infrastructure and through supporting regional integration. The DBSA operates under Schedule 2 of the Public Finance Management Act (PFMA) and is mandated by the DBSA Act No 13 of 1997. The role of the Bank in driving development through de-risking projects, market making during counter-cyclical times and providing access to citizens is crucial in South Africa and the African continent. Its strategic objectives include driving sustainable growth with development impact, providing integrated infrastructure solutions and ensuring financial sustainability.

The DBSA has three strategic pillars which encompass its strategic focus areas. These include:

- **Driving inclusive economic recovery in South Africa** and meaningful growth and seeks to build on existing initiatives while adapting to current changing market conditions. Agility and focus on the development mandate are critical to the successful attainment in this focus area. Inclusive economic recovery requires strong governance and the strengthening of institutions which is a by-product of various DBSA initiatives. This focus area incorporates both economic access and transformation. The latter emphasizes patterns of ownership of the South African economy. In this regard, appropriate interventions have been identified to accelerate meaningful black economic transformation and gender mainstreaming in the infrastructure space.

- **Doing things differently** through the creation of a Digital DBSA which is both future fit and resilient in order to build an organisation that is relevant and has efficient processes, strong governance, and appropriate accountabilities.

- **Creating a strategic Africa lens** by developing a country position in collaboration with the private sector, national governmental bodies and other DFI’s to capitalise on growth opportunities around the continent. This requires the maintenance of strong profitability and ongoing liquidity and credit risk management as well as the management of the non-performing portfolio.
2. PURPOSE

As an entity listed under Schedule 2 of the PFMA, the DBSA is legislatively required to develop an Annual Performance Plan (APP), herein referred to as Corporate Plan. The Corporate Plan identifies strategically important outcomes-oriented goals and objectives against which the DBSA’s medium-term results can be measured and evaluated by the National Treasury, Parliament, and the Public.

On an annual basis the DBSA holds two-day management strategy sessions with members of the Executive Committee and members of the Board i.e., total of four days. The purpose of these sessions is to reflect on past corporate performance and realign the short-term and long-term organisational goals with the overarching DBSA mandate and the DBSA development position. The outcome of these sessions is a set of cohesive corporate initiatives that are collaboratively developed and informed by data driven insights, best practice, and predictions about the future of the DBSA. These sessions are often facilitated by an external service provider who is responsible for: (1) providing an expert view on the development finance industry (particularly in the infrastructure financing space), (2) synthesizing strategic themes and (3) coordinating ideas from the sessions. The sessions are focused on the existing strategic themes and pertinent areas of challenge/opportunity within. The purpose of the Terms of Reference (TOR) is to outline the requirements, scope of work and expected outputs of the successful service provider from this procurement process.

3. DETAILED SCOPE OF WORK

The successful Professional Service Provider (PSP) is expected to undertake the following activities:

i. Develop a strategy session facilitation plan which includes:
   o an agenda for the two-day sessions (which is based on the DBSA strategic focus areas for the session)
   o A list of potential guest speakers (to be agreed to with the DBSA) who are subject matter experts in DBSA sectors of investment, infrastructure growth and innovation as and/or operational efficiencies (with biographic information).
o Source and pay (where relevant) guest speakers relevant to the strategic themes and communicate the cost of these speakers upfront.

o To encourage active engagement and discussion in accordance with the agenda/programme and to achieve the objectives of the strategy session.

ii. The successful bidder must be familiar with all prior DBSA planning documents and Annual Reports. (*DBSA will make these available to the successful bidder*).

iii. Engage organizational representatives to gather strategic input prior to strategy sessions, such as (but not limited to) the Corporate Strategy Team, the Chief Economist, the Chief Executive Officer, and Board Chairperson.

iv. Attend and facilitate both the two-day Management session (*and potentially*) the Board session.

v. Provide guidance to the Executive Team on innovative methodologies to activate DBSA’s programmes and other resolutions of the strategic sessions.

vi. Produce a detailed DBSA Strategic Planning Report with all strategy sessions discussions and outcomes.

4. **REQUIRED EXPERTISE**

The requisite skills and experience expected from the supplier include the following:

a) **Company experience**

- The bidder should have experience in corporate strategy development and facilitation including experience in engaging and soliciting input from senior stakeholders and working collaboratively across teams

- The bidder possesses an in-depth understanding of the role of development finance institutions, particularly the importance of infrastructure finance, including emerging trends, pain points and opportunities relevant to the operations of the DBSA.

- The successful bidder will have to provide demonstrable evidence and experience in this regard.
b) References and example/s of strategy facilitation report compiled

- Bidder to provide at least three (3) reference letters in strategy facilitation and/or DFI experience/Africa strategy development leading organizations both locally and internationally – references should be on a formal letterhead of the referee and signed by the authorised person.

- Examples of strategy facilitation report compiled.

5. TIME FRAMES AND DURATION

- The Management session is indicatively scheduled for 13-14 October 2022 and the Board session on 26-27 October 2022. Dates subject to change. It is possible that the service provider’s engagement may be limited to only facilitating the Management strategy session.

- Upon successful appointment, the Service Provider will be expected to engage with the project sponsor, in preparation for the strategy sessions, as recommended by the DBSA Project Team. The services should be initiated in at least one week after signing the acceptance letter.

- It is anticipated that the tasks associated with this process will require the Service Provider to be available for the full duration of both strategy sessions as well as for the post session feedback or as determined by the client (DBSA).

6. MANAGEMENT AND REPORTING

The successful Professional Service Provider (PSP) shall report to the Project Manager on the ongoing process and work in close collaboration with any internal clients deemed vital for the successful completion of the assignment (e.g., the Strategy team). The Project Manager will review and oversee the completion of the strategy sessions. It is further envisaged that the payment schedule will be aligned to the milestone achievement and will be paid in accordance with the DBSA’s framework order payment process.
7. TECHNICAL EVALUATION OF PROPOSAL

The Bid Evaluation Committee coordinated by the DBSA, will evaluate submissions based on the following criteria
<table>
<thead>
<tr>
<th>Description</th>
<th>Evidence</th>
<th>Scoring guidelines</th>
<th>Weighting</th>
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</thead>
<tbody>
<tr>
<td><strong>Planning/Methodology</strong></td>
<td>Detailed plan comprising of the following but not limited to:</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Bidder to provide a strategy session plan</td>
<td>a) An agenda for the two-day sessions</td>
<td>No plan submitted = 0 points</td>
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<tr>
<td>that includes:</td>
<td>b) A list of potential guest speakers who are subject matter experts in</td>
<td>Poor plan submitted and information is insufficient and</td>
<td></td>
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<td></td>
<td>DBSA sectors of investment, infrastructure growth and innovation</td>
<td>unsatisfactory = 15 points</td>
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<td></td>
<td>as and/or operational efficiencies (with biographic information)</td>
<td>Plan submitted, but missing one or two (a-c) points = 21</td>
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<td></td>
<td>c) A facilitation guide: This guide should be created in conjunction</td>
<td>points</td>
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<td>with the agenda, corporate plan and expected outcomes for the sessions</td>
<td>Detailed satisfactory plan comprising of all points (a-c)</td>
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<td></td>
<td></td>
<td>= 30 points</td>
<td></td>
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<tr>
<td><strong>References</strong></td>
<td>a) Reference letters in strategy facilitation and/or DFI experience/Africa</td>
<td>Excellent: three or more relevant references provided</td>
<td>20</td>
</tr>
<tr>
<td>Bidder to provide at least three (3)</td>
<td>strategy facilitation and/or DFI experience/Africa strategy development</td>
<td>and an example/s of strategy facilitation report compiled</td>
<td></td>
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<tr>
<td>references in strategy facilitation and/or DFI experience/Africa strategy development leading organizations both locally and internationally. These references should preferably be from at least one state owned</td>
<td>leading organizations both locally and internationally.</td>
<td>= 20 points</td>
<td></td>
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<tr>
<td>references</td>
<td></td>
<td>Good: two relevant references provided = 14</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Evidence</td>
<td>Scoring guidelines</td>
<td>Weighting</td>
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<td>entity/ DFI/ municipality, and all must pertain to the sectors that the Bank operates in.</td>
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<td>points</td>
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<td>Fair: one relevant reference provided = 10 points</td>
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<tr>
<td></td>
<td></td>
<td>Insufficient: no relevant references provided = 0 points</td>
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<tr>
<td><strong>Company Experience</strong></td>
<td>a) The service provider must demonstrate their experience as a Strategy Facilitator; conducted in State Owned Entities (SOE’s)/DFI/National, Provincial or Local Government. b) The service provider must provide company profile, with information containing but not limited to experience and number of years in strategic planning facilitation.</td>
<td>Excellent: 10 years’ experience or more = 30 points Good: 7-10 years’ experience = 21 points Fair: between 5 to 6 years’ experience = 15 points</td>
<td>30</td>
</tr>
<tr>
<td>Company experience (10 years or more) and track record for facilitation of strategic planning workshops/business strategy planning processes</td>
<td></td>
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<tr>
<td><strong>Qualifications of key personnel – Lead Facilitator (Honours Degree)</strong></td>
<td>Curriculum Vitae of Lead Facilitators and all supporting documents/ copies of qualifications</td>
<td>Honours Degree or above = 20 points Bachelor’s Degree = 14</td>
<td>20</td>
</tr>
<tr>
<td>Description</td>
<td>Evidence</td>
<td>Scoring guidelines</td>
<td>Weighting</td>
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<td>points</td>
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<td>National Diploma = 10 points</td>
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<td>Total</td>
<td></td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>Threshold</td>
<td></td>
<td></td>
<td>70</td>
</tr>
</tbody>
</table>
Bidders who fail to obtain 70 points or above will not be evaluated further for Price and B-BBEE. The below threshold will be used:

<table>
<thead>
<tr>
<th>AREA</th>
<th>MAXIMUM POINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>80</td>
</tr>
<tr>
<td>B-BBEE</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>

8. RESERVATIONS
The DBSA expressly reserves the following rights:

- To appoint more than one service provider for this assignment.
- To waive any or all irregularities in the proposals submitted.
- To appoint different service providers for different levels of the assigned work.
- To retain the right not to select any Service Provider for this assignment.

9. CONFIDENTIALITY AND INTELLECTUAL PROPERTY
Information contained in this Request for Proposals is confidential and is the property of the DBSA. Similarly, the Bank shall hold all property rights such as copyright, patents and registered trademarks on matters directly related to or derived from the work carried out through this contract.
PRICE EVALUATION

i. All prices must be quoted in South African Rand (ZAR).

ii. Bidders are requested to provide a detailed cost breakdown of all activities which are involved in executing the project as indicated in the project scope. Failure to provide this information will invalidate the RFQ response based on incompleteness.

PRICING SCHEDULE

Professional fees

1. Specify role/s on assignment
2. Specify the name and experience of the person to be assigned to each role
3. Provide the charge out rate for each person
4. Provide an estimate of hours per role to deliver the scope of work (the information provided in this RFQ

1. Pricing schedule

PRICING SCHEDULE A – MANAGEMENT STRATEGY SESSION

<table>
<thead>
<tr>
<th>ID</th>
<th>KEY DELIVERABLE AS PER SCOPE OF WORK</th>
<th>EXPERT DESCRIPTION</th>
<th>EXPECTED OUTCOME/S</th>
<th>ESTIMATED NUMBER OF DAYS</th>
<th>RATE PER HOUR</th>
<th>TOTAL RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Planning</td>
<td>Briefing/planning meetings with Corporate Strategy/Chief executive, other stakeholders</td>
<td>Final Agenda/Programme</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Speakers</td>
<td>Source and pay <em>(where relevant)</em> for all guest speakers <em>(agreed to by the DBSA)</em> relevant to the strategic themes,</td>
<td>To give expert industry trends, insights and knowledge that will help the DBSA planning process.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>KEY DELIVERABLE AS PER SCOPE OF WORK</td>
<td>EXPERT DESCRIPTION</td>
<td>EXPECTED OUTCOME/S</td>
<td>ESTIMATED NUMBER OF DAYS</td>
<td>RATE PER HOUR</td>
<td>TOTAL RATE</td>
</tr>
<tr>
<td>----</td>
<td>-------------------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>--------------------------</td>
<td>---------------</td>
<td>------------</td>
</tr>
<tr>
<td>3</td>
<td>Management Strategy Session</td>
<td>Facilitation of a vigorous participatory two (2) day Workshop with Management members and Heads of Units within DBSA, with up to 6 breakaway sessions.</td>
<td>Identify and finalise 2023/2024 strategic priorities for the Bank.</td>
<td>Two days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Management Reporting</td>
<td>Produce and present Management Strategic Planning Report to the DBSA with all strategy sessions discussions and outcomes.</td>
<td>Management Strategic Planning Report</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL OF PROPOSED TIME-BASED FEES EXCLUDING VAT**

**15% VAT**

**TOTAL PROPOSED TIME-BASED FEES INCLUDING VAT**
### PRICING SCHEDULE B – BOARD STRATEGY SESSION (not confirmed)

<table>
<thead>
<tr>
<th>ID</th>
<th>KEY DELIVERABLE AS PER SCOPE OF WORK</th>
<th>EXPERT DESCRIPTION</th>
<th>EXPECTED OUTCOME/S</th>
<th>ESTIMATED NUMBER OF DAYS</th>
<th>RATE PER HOUR</th>
<th>TOTAL RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Planning</td>
<td>Briefing/planning meetings with Corporate Strategy/ Chief executive, Board Chairperson, other stakeholders</td>
<td>Final Agenda/Programme</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Board Strategy Session (not confirmed)</td>
<td>Possible facilitation of a vigorous participatory two (2) day Workshop with the Board members and Management.</td>
<td>Alignment of 2023/2024 strategic priorities to: •Long-term strategy •Shareholder expectations etc.</td>
<td>Two days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Board Reporting (not confirmed)</td>
<td>Produce and present Board Strategic Planning Report to the DBSA with all strategy session’s discussions and outcomes.</td>
<td>Board Strategic Planning Report</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL OF PROPOSED TIME-BASED FEES EXCLUDING VAT**

<table>
<thead>
<tr>
<th></th>
<th>15% VAT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL PROPOSED TIME-BASED FEES INCLUDING VAT</strong></td>
<td></td>
</tr>
</tbody>
</table>

Bidders are to provide a Price Quotation as Annexure B, indicating the pricing or fees in line with the quantities, requirements or scope of work the bidders are expected to deliver (the information provided in this RFQ) on which the bidders are expected to quote. This will be a fixed price contract based on the total amount appearing in the schedule above.
Annexure C

SBD 4

BIDDER’S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder’s declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise, employed by the state? YES/NO

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

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Identity Number</th>
<th>Name of State institution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? YES/NO

2.2.1 If so, furnish particulars:

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

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

1 the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.
2.3.1 If so, furnish particulars:

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

3. DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

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

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

---

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

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

<table>
<thead>
<tr>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Name of bidder</td>
</tr>
</tbody>
</table>
PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

1.1.6.1

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


1. GENERAL CONDITIONS

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

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

1.2

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

b) Either the 80/20 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:

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

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

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

(a) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

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

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

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

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

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

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

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

1) level certificate issued by an authorized body or person;

2) as prescribed by the B-BBEE Codes of Good Practice;

3) requirement prescribed in terms of the B-BBEE Act;

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

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

3. POINTS AWARDED FOR PRICE

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

A maximum of 80 or 90 points is allocated for price on the following basis:
\[ P_s = 80 \left( 1 - \frac{P_t - P_{\text{min}}}{P_{\text{min}}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\text{min}}}{P_{\text{min}}} \right) \]

Where

- \( P_s \) = Points scored for price of bid under consideration
- \( P_t \) = Price of bid under consideration
- \( P_{\text{min}} \) = 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:

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

### 5. BID DECLARATION

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

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

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

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

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

(Tick applicable box)

YES  NO

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted........................................ %

ii) The name of the sub-contractor.................................................................

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

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

(Tick applicable box)

YES  NO

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

<table>
<thead>
<tr>
<th>Designated Group: An EME or QSE which is at last 51% owned by:</th>
<th>EME ✓</th>
<th>QSE ✓</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are youth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people with disabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people living in rural or underdeveloped areas or townships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooperative owned by black people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are military veterans</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OR

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Any EME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any QSE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. DECLARATION WITH REGARD TO COMPANY/FIRM

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

8.2 VAT registration number:....................................................................................................

8.3 Company registration number:................................................................................................

8.4 TYPE OF COMPANY/ FIRM

☐ Partnership/Joint Venture / Consortium

☐ One person business/sole propriety
☐ Close corporation
☐ Company
☐ (Pty) Limited

[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-BBEE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/firm for the preference(s) shown and I / we acknowledge that:

i) The information furnished is true and correct;

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

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

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

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

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

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

SBD 7.1

(b) CONTRACT FORM - PURCHASE OF GOODS/WORKS

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

(c) PART 1 (TO BE FILLED IN BY THE BIDDER)

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

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

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

   (ii) General Conditions of Contract; and

   (iii) Other (specify)

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

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

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

6. I confirm that I am duly authorised to sign this contract.
| NAME (PRINT) | ............................................. |
| CAPACITY     | ............................................. |
| SIGNATURE    | ............................................. |
| NAME OF FIRM | ............................................. |
| DATE         | ............................................. |

**WITNESSES**

1. 

2. 

**DATE:** 

---
SBD 7.1

CONTRACT FORM - PURCHASE OF GOODS/WORKS

(d) PART 2 (TO BE FILLED IN BY THE PURCHASER)

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

2. An official order indicating delivery instructions is forthcoming.

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

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

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

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

NAME (PRINT) ………………………………………

SIGNATURE ………………………………………

OFFICIAL STAMP

WITNESSES
1. ………………………

2. ………………………
Annexure F

SBD 8

DECLARATION OF BIDDER’S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

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

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

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

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the audi alteram partem rule was applied).</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

The Database of Restricted Suppliers now resides on the National Treasury’s website [www.treasury.gov.za](http://www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.

| 4.1.1 | If so, furnish particulars: | | |
| 4.2 | 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)? | Yes | No |
| 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 | No |
| 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 | No |
| 4.4.1 | If so, furnish particulars: | |

**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 |
ANNEXURE E

CERTIFICATE OF INDEPENDENT BID DETERMINATION

SBD 9

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

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

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

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

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

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

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

I, the undersigned, in submitting the accompanying bid:

______________________________________________

___

(Bid Number and Description)

in response to the invitation for the bid made by:

___________________________________________________________

_________

(Name of Institution)

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

I certify, on behalf
of:______________________________________________________ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

   (a) has been requested to submit a bid in response to this bid invitation;
   (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
   (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder.
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium\(^3\) will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
   (a) prices;
   (b) geographical area where product or service will be rendered (market allocation)
   (c) methods, factors or formulas used to calculate prices;
   (d) the intention or decision to submit or not to submit, a bid;
   (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
   (f) bidding with the intention not to win the bid.

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

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

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

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

......................................................... .......................................................  
Position                                                                 Name of Bidder
Annexure G
Annexure H

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

Where Applicable, Bidders are required to include, as Annexure E to their Bids, supporting documents to their responses to the Pre-Qualifying Criteria.

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

TAX COMPLIANT STATUS AND CSD REGISTRATION REQUIREMENTS

All prospective bidders must have a tax compliant status either on the Central Supplier Database (CSD) of the National Treasury or SARS e-filing prior to appointment/award of the bid.

Registration on the CSD site of the National Treasury is a compulsory requirement for a bidder to be appointed, to conduct business with the DBSA. The onus is on the successful bidder to register on the CSD site and provide proof of such registration prior to appointment/award of the bid.

CSD Registration Number: