

REQUEST FOR PROPOSALS

YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED	
BID NUMBER:	RFP113/2025
COMPULSORY BRIEFING SESSION DETAILS:	09 September 2025 Time:10H30am MS TEAMS LINK: RFP113/2025 Compulsory Briefing Session Link
CLOSING DATE:	22 September 2025
CLOSING TIME:	23H55 (Midnight)
PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:	120 days
DESCRIPTION OF BID:	APPOINTMENT OF AN ACCREDITED, CREDIBLE, EXPERIENCED, AND INDEPENDENT SERVICE PROVIDER (ISP) TO IMPLEMENT A COMPREHENSIVE SUITE OF EMPLOYEE WELLNESS (EW) SERVICES, WHICH INCLUDE AN EMPLOYEE WELLNESS PROGRAMME (EWP) AND AN EMPLOYEE ASSISTANCE PROGRAMME (EAP) FOR A PERIOD OF FIVE YEARS
BID DOCUMENTS ELECTRONIC SUBMISSION:	ELECTRONIC SUBMISSIONS <u>INSTRUCTIONS:</u> <ul style="list-style-type: none"> ➤ Bidders are required to submit written requests for clarification via e-mail to Tumim@dbsa.org ONLY, quoting the RFP Number on the subject of the e-mail. This must be done three (3) working days before the submission date. ➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically. ➤ Written requests for clarification will be considered up to and Including 16 September 2025 16:00 Johannesburg time. Requests received after this date may not be attended to. ➤ Any requests after the stipulated date and time may be disregarded.

	<p>NB: Electronic submission is encouraged for all bidders interested in this tender.</p> <p>Closing date of this RFP113/2025 is 22 September 2025 before 23:55PM.</p> <p>No physical bids will be received or accepted at the DBSA offices</p>
NAME OF BIDDER:	
CONTACT PERSON:	
EMAIL ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
BIDDER'S STAMP OR SIGNATURE	



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

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

Table of Contents

PART A	4
PART B	7
PART C	8
PART D	10
PART E	27
TERMS OF REFERENCE	27
ANNEXURE A: Pricing Schedule	42
ANNEXURE B: DEMONSTRATED TRACK RECORD AND EXPERIENCE OF THE SERVICE PROVIDER.....	43
Annexure C	44
Annexure D	47
Annexure E.....	53
Annexure F.....	54
Annexure G	55
Annexure H	56
Annexure I.....	57
Annexure J.....	58

**PART A
INVITATION TO BID**

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

BID NUMBER: RFP113/2025

DESCRIPTION: Appointment of an accredited, credible, experienced, and Independent Service Provider (ISP) to implement a comprehensive suite of Employee Wellness (EW) services, which include an Employee Wellness Programme (EWP) and an Employee Assistance Programme (EAP) for a period of five years.

COMPULSORY BRIEFING: 09 September 2025 Tender briefing will be done online via Microsoft teams.

COMPULSORY BRIEFING LINK: [RFP113/2025 Compulsory Briefing Session Link](#)

Time: 10:30am Johannesburg time (Microsoft Teams)


Closing time for the OneDrive Link requests and tender Enquiries – 16H00 on the 16 September 2025 (Telkom Time)

BID SUBMISSION CLOSING DATE: 22 September 2025

CLOSING TIME: 23H55PM

Submission format (OneDrive)

Name

 Bidder Name

- a) It remains the bidder's responsibility to ensure that the bid submission is uploaded using the correct bidder document and tender link.
- b) Should a bidder encounter an issue with the system, the bidder must provide sufficient evidence as proof of attempting to upload their submission before the cut-off time and the error received.
- c) Faxed, emailed bids will not be accepted, only an electronic submission received via the link will be accepted.
- d) It is therefore the responsibility of the bidder to request for a link to participate.
- e) The DBSA assumes no responsibility if a Bidder's designated email address is not correct, or if there are technical challenges, including those with the Bidder's computer, network, or internet service provider (ISP)

BID SUBMISSION LINK REQUESTS:

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

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

THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED).

BIDDERS THAT ARE UNINCORPORATED CONSORTIA CONSISTING OF MORE THAN ONE LEGAL ENTITY MUST SELECT A LEAD ENTITY AND FURNISH THE DETAILS OF THE LEAD ENTITY, UNLESS OTHERWISE SPECIFIED.

NAME OF BIDDER AND EACH ENTITY IN CONSORTIUM:				
POSTAL ADDRESS:				
STREET ADDRESS:				
CONTACT PERSON (FULL NAME):				
EMAIL ADDRESS:				
TELEPHONE NUMBER:				
FAX NUMBER:				
BIDDER REGISTRATION NUMBER OR REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM				
BIDDER VAT REGISTRATION NUMBER OR VAT REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM				
BBBEE STATUS LEVEL VERIFICATION	YES		NO	

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.)				
CERTIFICATE/BBBEE STATUS LEVEL SWORN AFFIDAVIT SUBMITTED? [TICK APPLICABLE BOX]				
IF YES, WHO ISSUED THE CERTIFICATE?				
REGISTERED WITH THE NATIONAL TREASURY CSD [TICK APPLICABLE BOX]	YES		NO	
CSD REGISTRATION NUMBER				
TAX COMPLIANCE STATUS PIN (TCS) NUMBER ISSUED BY SARS				

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE SUBMITTED ELECTRONICALLY 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)</p> <p>1.3. SOUTH AFRICAN 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 BY 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 MUST BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 ALL BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS IN THEIR COUNTRY OF RESIDENCE.</p> <p>2.2 SOUTH AFRICAN 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 SOUTH AFRICAN BIDDERS CAN APPLY 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 SA 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 (TAX COMPLIANCE) IN ACCORDANCE WITH APPLICABLE LEGISLATION IN THEIR COUNTRY OF RESIDENCE.</p> <p>2.6 WHERE SA BIDDERS HAVE NO TCS AVAILABLE BUT ARE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS
<p>3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p>

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.

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; and
- Use the prescribed sequence in attaching the annexures that complete the Bid Document

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

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	One original Bid document in separate folders; Folder 1 - for Pre-Qualifying Criteria and Functional Evaluation and Folder 2 - Price / Financial Proposal – Electronic submission
<input type="checkbox"/>	<input type="checkbox"/>	Part A: Invitation to Bid
<input type="checkbox"/>	<input type="checkbox"/>	Part B: Terms and Conditions of Bidding
<input type="checkbox"/>	<input type="checkbox"/>	Part C: Checklist of Compulsory Returnable Schedules and Documents
<input type="checkbox"/>	<input type="checkbox"/>	Part D: Conditions of Tendering and Undertakings by Bidders
<input type="checkbox"/>	<input type="checkbox"/>	Part E: Specifications/Terms of Reference and Project Brief
<input type="checkbox"/>	<input type="checkbox"/>	Annexure A: Price Proposal Requirement
<input type="checkbox"/>	<input type="checkbox"/>	Annexure B: Demonstrated track record and experience of the service provider
<input type="checkbox"/>	<input type="checkbox"/>	Annexure C: SBD4 Declaration of Interest
<input type="checkbox"/>	<input type="checkbox"/>	Annexure D: SBD6.1 and B-BBEE status level certificate
<input type="checkbox"/>	<input type="checkbox"/>	Annexure E: Certified copies of your CIPC company registration documents listing all members with percentages, in case of a close corporation.

☐ ☐ **Annexure F:** Certified copies of latest share certificates, in case of a company.

☐ ☐ **Annexure G: (if applicable):** A breakdown of how fees and work will be spread between members of the bidding consortium.

☐ ☐ **Annexure H:** Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria.

☐ ☐ **Annexure I:** General Condition of Contract

☐ ☐ **Annexure J:** 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, 2022.
- 1.4 **Business Day** means a day which is not a Saturday, Sunday or public holiday in South Africa.
- 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** for the OneDrive Link submissions – 16h00 on the 26 August 2024 (Telkom Time)
- 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 26 (Evaluation Process) of this Part C, which includes the Qualifying Criteria, Functional Criteria and Price and Preferential Points Assessment (where applicable).
- 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, 2022 published in terms of the PPPFA.
- 1.18 **Pre-Qualifying Criteria** means the criteria set out in clause **Error! Reference source not found.** of this Part C.
- 1.19 **Price and Preferential Points Assessment** means the process described in clause **Error! Reference source not found.** 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

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: Tumim@dbsa.org

No questions will be answered telephonically.

4. SUBMISSION OF TENDERS

COMPULSORY BRIEFING: 09 September 2025- Tender briefing will be done online via Microsoft teams.

LINK: [RFP113/2025 Compulsory Briefing Session Link](#)

Time: 10:30am Johannesburg time (**Microsoft Teams**)

LINK REQUESTS: Bidders are asked to nominate one dedicated contact person (name, email address and phone number to request a submission link in writing to Tumim@dbsa.org).

Tender Submission Deadline:

CLOSING DATE: 22 September 2025

CLOSING TIME: 23H55pm

5. RULES GOVERNING THIS RFP AND THE TENDERING PROCESS

- 5.1 Participation in the tender process is subject to compliance with the rules contained in this RFP Part C.
- 5.2 All persons (whether a participant in this tender process or not) having obtained or received this RFP may only use it, and the information contained herein, in compliance with the rules contained in this RFP.
- 5.3 All Bidders are deemed to accept the rules contained in this RFP Part C.
- 5.4 The rules contained in this RFP Part C apply to:
 - 5.4.1 The RFP and any other information given, received or made available in connection with this RFP, and any revisions or annexure.
 - 5.4.2 the Tendering Process; and
 - 5.4.3 any communications (including any briefings, presentations, meetings and negotiations) relating to the RFP or the Tendering Process.

6. STATUS OF REQUEST FOR PROPOSAL

- 6.1 This RFP is an invitation for 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.

7. ACCURACY OF REQUEST FOR PROPOSAL

- 7.1 Whilst all due care has been taken in connection with the preparation of this RFP, the DBSA makes no representations or warranties that the content in this RFP or any information communicated to or provided to Bidders during the Tendering Process is, or will be, accurate, current or complete. The DBSA, and its officers, employees and advisors will not be liable with respect to any information communicated which is not accurate, current or complete.
- 7.2 If a Bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA (other than minor clerical matters), the Bidder must promptly notify the DBSA in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the DBSA an opportunity to consider what corrective action is necessary (if any).
- 7.3 Any actual discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA will, if possible, be corrected and provided to all Bidders without attribution to the Bidder who provided the written notice.

8. ADDITIONS AND AMENDMENTS TO THE RFP

- 8.1 The DBSA reserves the right to change any information in, or to issue any addendum to this RFP before the Closing Time. The DBSA and its officers, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right.
- 8.2 If the DBSA exercises its right to change information in terms of clause 8.1, it may seek amended Tenders from all Bidders.

9. REPRESENTATIONS

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

10. CONFIDENTIALITY

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

11. REQUESTS FOR CLARIFICATION OR FURTHER INFORMATION

- 11.1 All communications relating to this RFP and the Tendering Process must be directed to the Tender Officer.
- 11.2 All questions or requests for further information or clarification of this RFP or any other document issued in connection with the Tendering Process must be submitted to the Tender Officer in writing, and most preferably by e-mail to tumim@dbsa.org
- 11.3 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).
- 11.4 The DBSA has restricted the period during which it will accept questions or requests for further information or clarification and reserves the right not to respond to any enquiry or request, irrespective of when such enquiry or request is received.
- 11.5 Except where the DBSA is of the opinion that issues raised apply only to an individual Bidder, questions submitted and answers provided will be made available to all Bidders by e-mail, as well as on the DBSA's website without identifying the person or organisation which submitted the question.
- 11.6 In all other instances, the DBSA may directly provide any written notification or response to a Bidder by email to the address of the Bidder (as notified by the Bidder to the Tender Manager).
- 11.7 A Bidder may, by notifying the Tender 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.

12. UNAUTHORISED COMMUNICATIONS

- 12.1 Communications (including promotional or advertising activities) with staff of the DBSA or their advisors assisting with the Tendering Process are not permitted during the Tendering Process, or otherwise with the prior consent of the Tender Officer. Nothing in this clause 12 is intended to prevent communications with staff of, or advisors to, the DBSA to the extent that such communications do not relate to this RFP or the Tendering Process.
- 12.2 Bidders must not otherwise engage in any activities that may be perceived as, or that may have the effect of, influencing the outcomes of the Tendering Process in any way.

13. IMPROPER ASSISTANCE, FRAUD AND CORRUPTION

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

14. ANTI-COMPETITIVE CONDUCT

- 14.1 Bidders and their respective officers, employees, agents and advisors must not engage in any collusion, anti-competitive conduct or any other similar conduct in respect of this Tendering Process with any other Bidder or any other person(s) in relation to:
 - 14.1.1 the preparation or lodgement of their Bid
 - 14.1.2 the evaluation and clarification of their Bid; and
 - 14.1.3 the conduct of negotiations with the DBSA.
- 14.2 For the purposes of this clause 14, collusion, anti-competitive conduct or any other similar conduct may include disclosure, exchange and clarification of information whether or not such information is confidential to the DBSA or any other Bidder or any other person or organisation.
- 14.3 In addition to any other remedies available to it under law or contract, the DBSA may, in its absolute discretion, immediately disqualify a Bidder that it believes has engaged in any collusive, anti-competitive conduct or any other similar conduct during or before the Tendering Process.

15. COMPLAINTS ABOUT THE TENDERING PROCESS

- 15.1 Any complaint about the RFP or the Tendering Process must be submitted to the Supply Chain Management Unit in writing, by email, immediately upon the cause of the complaint arising or becoming known to the Bidder, (tenders@dbsa.org)
- 15.2 The written complaint must set out:
 - 15.2.1 the basis for the complaint, specifying the issues involved;
 - 15.2.2 how the subject of the complaint affects the organisation or person making the complaint;
 - 15.2.3 any relevant background information; and
 - 15.2.4 the outcome desired by the person or organisation making the complaint.
- 15.3 If the matter relates to the conduct of an employee of the DBSA, the complaint should be addressed in writing marked for the attention of the Chief Executive Officer of the DBSA, and delivered to the physical address of the DBSA, as notified.

16. CONFLICT OF INTEREST

- 16.1 A Bidder must not, and must ensure that its officers, employees, agents and advisors do not place themselves in a position that may give rise to actual, potential or perceived conflict of interest between the interests of the DBSA and the Bidder's interests during the Tender Process.
- 16.2 The Bidder is required to provide details of any interests, relationships or clients which may or do give rise to a conflict of interest in relation to the supply of the services under any contract that may result from this RFP. If the Bidder submits its Bid and a subsequent conflict of interest arises, or is likely to arise, which was not disclosed in the Bid, the Bidder must notify the DBSA immediately in writing of that conflict.
- 16.3 The DBSA may immediately disqualify a Bidder from the Tendering Process if the Bidder fails to notify the DBSA of the conflict as required.

17. LATE BIDS

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

18. BIDDER'S RESPONSIBILITIES

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

- 18.1.2 fully informing themselves in relation to all matters arising from this RFP, including all matters regarding the DBSA's requirements for the provision of the Services;
 - 18.1.3 ensuring that their Bids are accurate and complete;
 - 18.1.4 making their own enquiries and assessing all risks regarding this RFP, and fully considering and incorporating the impact of any known and unknown risks into their Bid;
 - 18.1.5 ensuring that they comply with all applicable laws in regard to the Tendering Process particularly as specified by National Treasury Regulations, Guidelines, Instruction Notes and Practice Notes and other relevant legislation as published from time to time in the Government Gazette; and
 - 18.1.6 submitting all Compulsory Documents.
- 18.2 South African bidders with annual total revenue of ZAR10 million or less qualify as Exempted Micro Enterprises (EMEs) in terms of the B-BBEE Act must submit a certificate issued by a registered, independent auditor (who or which is not the Bidder or a part of the Bidder) or an accredited verification agency.
- 18.3 South African 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.
- 18.4 The DBSA reserves the right to require of a Bidder, either before a Bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the DBSA.
- 18.5 Failure to provide the required information may result in disqualification of the Bidder.

19. PREPARATION OF BIDS

- 19.1 Bidders must ensure that:
- 19.1.1 their Bid is submitted in the required format as stipulated in this RFP; and
 - 19.1.2 all the required information fields in the Bid are completed in full and contain the information requested by the DBSA.
- 19.2 The DBSA may in its absolute discretion reject a Bid that does not include the information requested or is not in the format required.
- 19.3 Unnecessarily elaborate responses or other representations beyond that which is sufficient to present a complete and effective tender proposal are not desired or required. Elaborate and expensive visual and other presentation aids are not necessary.

- 19.4 Where the Bidder is unwilling to accept a specified condition, the non-acceptance must be clearly and expressly stated. Prominence must be given to the statement detailing the non-acceptance. It is not sufficient that the statement appears only as part of an attachment to the Bid or be included in a general statement of the Bidders usual operating conditions.
- 19.5 An incomplete Bid may be disqualified or assessed solely on the information completed or received with the Bid.

20. ILLEGIBLE CONTENT, ALTERATION AND ERASURES

- 20.1 Incomplete Bids may be disqualified or evaluated solely on information contained in the Bid.
- 20.2 The DBSA may disregard any content in a Tender that is illegible and will be under no obligation whatsoever to seek clarification from the Bidder.
- 20.3 The DBSA may permit a Bidder to correct an unintentional error in its Bid where that error becomes known or apparent after the Closing Time, but in no event will any correction be permitted if the DBSA reasonably considers that the correction would materially alter the substance of the Bid or affect the fairness of the Tendering Process.

21. OBLIGATION TO NOTIFY ERRORS

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

22. RESPONSIBILITY FOR BIDDING COSTS

- 22.1 The Bidder's participation or involvement in any stage of the Tendering Process is at the Bidder's sole risk, cost and expense. The DBSA will not be held responsible for, or pay for, any expense or loss that may be incurred by Bidders in relation to the preparation or lodgement of their Bid.
- 22.2 The DBSA is not liable to the Bidder for any costs on the basis of any contractual, promissory or restitutionary grounds whatsoever as a consequence of any matter relating to the Bidder's participation in the Tendering Process, including without limitation, instances where:
- 22.2.1 the Bidder is not engaged to perform under any contract; or
 - 22.2.2 the DBSA exercises any right under this RFP or at law.

23. DISCLOSURE OF BID CONTENTS AND BID INFORMATION

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

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

24. USE OF BIDS

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

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

25. BID ACCEPTANCE

All Bids received must remain open for acceptance for a minimum period of 120 (one-hundred and twenty) days from the Closing Time. This period may be extended by written mutual agreement between the DBSA and the Bidder.

26. EVALUATION PROCESS

26.1 The Bids will be evaluated and adjudicated as follows:

26.1.1 First Stage – 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 is 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 separate from Folder 2: Pricing proposal submission	Pre-Qualifier	Y
2	Attendance Register of the Compulsory Briefing Session attended by the Tenderer.	Pre-Qualifier	Y
3	The bidder is to provide proof of Professional Registration with the Health Professional Council of South Africa (HPCSA) and/or the Employee Assistance Professionals Association of South Africa (EAPA-SA).	Pre-Qualifier	Y
4	<p>The service provider must provide evidence that their key personnel, allocated team resources and professionals are qualified. Key personnel allocated team resources, and qualified professionals should have a minimum of 10 years of experience each:</p> <ul style="list-style-type: none"> • Social Workers with a Degree in Social Work and registered with SACSSA. • Clinical Psychologists with a Degree in the field of Psychology and registered with HPCSA (e.g. Clinical, Counselling, Education, Industrial, Research Psychologist); • Lawyers with an LLB or equivalent qualification with admission as an Attorney/ Advocate with experience in litigation/advisory. • Nurses with a basic R425 qualification, registered with SANCA and with experience as a professional nurse. • Financial Advisors with a National Diploma or B Degree in Accounting/Financial Management/ Cost Management Accounting with experience as a Financial Advisor. • Occupational Health Practitioners with a relevant SAQA-accredited OHS qualification. 	Pre-Qualifier	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.

Responsiveness Criteria		Clarification Time	Applicable to this Tender (Y/N)
1	Standard conditions of tender as required.	48hours	Y
2	Returnable documents completed and signed.	48hours	Y

3	Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be registered to do business with the DBSA.	72 hours	Y
4	A Tax Pin issued by SARS.	48hours	Y

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

26.1.2 Second Stage –Technical/Functional criteria

Only those Bidders who meet the minimum score (75) or above out of 100 of the technical requirements will proceed to pricing evaluation (third Stage). Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable. Bidders will be assessed on the functionality criteria (Second Stage) as set out in this RFP.

26.1.3 Third Stage – price

26.1.3.1 Those Bidders which have passed the First Stage (Responsiveness Test) and Second Stage (Functionality Evaluation) of the tender process will be eligible to be evaluated on the Third Stage, based on price, in accordance with the PPPFA regulations.

26.1.3.2 The recommended preferred Bidder will be the Bidder with the lowest overall price in the Third Stage of the Bid evaluation, unless the DBSA exercises its right to cancel the RFP, in line with the PPPFA Regulations.

26.2 NB: Bidders are required to submit, as Annexure H to their Bids, any documentation which supports the responses provided in respect of the functionality Criteria above.

27. Risk Analysis and Objective Criteria

Risk Analysis and Objective Criteria *(This must only be included in the tender document if it is applicable, ensure that the list is specific as to what your objective criteria are)*

The DBSA reserves the right to award the tender to the tenderer who scores the highest number of points overall in line with Section (2) (1) (f) of the PPPFA, unless there are objective criteria which will justify the award of the tender to another tenderer. The objective criteria that the DBSA may apply in this bid process include:

- i. Any bidder that has a cumulative order book totalling 3 Awards with outstanding value, **may be excluded from further evaluation.**
- ii. Where a bidder has 3 active Awards with an outstanding value and the outstanding value is 10% or less, indicating the project is nearing completion, the bidder may be included **for further evaluation and/or recommendation for award.**

- iii. Where a bidder has 3 active Awards with an outstanding value and at least one of the projects has stalled for a period of 6 months or more, or the client has placed the project on hold indefinitely, the bidder may be included **for further evaluation and/or recommendation for award.**
- iv. The DBSA has the discretion to apply an objective criterion.

28. Due Diligence

DBSA shall perform a due diligence exercise on the preferred bidder to determine its risk profile. The due diligence exercise may take the following factors into account inter alia.

a. Judgements and criminal convictions

DBSA may consider previous civil judgements against the preferred bidder as part of its risk assessment. DBSA may also consider whether the preferred bidder or any of its directors have been convicted of a serious offence.

b. Pending litigation/liquidation/business rescue (distinct from Working Capital)

DBSA may consider any pending litigation in a court of law or administrative tribunal as part of its risk assessment.

c. Performance

DBSA will not consider the Service provider having a history of poor performance on any task orders/purchase orders or contracts, including poor performance in respect of compliance with policies or procedures regarding safety, health, quality control or environment, or having committed a serious and gross breach of contract.

d. Reputational harm

If DBSA is likely to suffer substantial reputational harm because of doing business with the preferred service provider, it may take this into account as part of its risk assessment.

e. Restricted/Blacklisted

Is not under restrictions, or has principals who are under restrictions, preventing participating in the employer's procurement.

f. Vetting

The DBSA reserves the right to conduct vetting on the tenderer or any of its directors.

- g. PEP Checks for both Companies and Individual directors, as well as Procure Check and/or any other systems that the DBSA may choose to utilize (which may be conducted by an authorized third party) that would be done to assess all risks, including but not limited to

- a. Financial stability of the bidder based on key ratio analysis ;

- b. Efficiency;
- c. Profitability;
- d. Financial Risk;
- e. Liquidity;
- f. Acid Test;
- g. Solvency; and
- h. Commercial relationship with a politically exposed and brand risk.

- i. The DBSA reserves the right to award the scope in full or part thereof, subject to budget availability.
- ii. The DBSA reserves the right to negotiate to ensure the value for money principle is not compromised.

29. Generally, suppliers have their own business standards and regulations. Although DBSA cannot control the actions of our suppliers, we will not tolerate any Illegal activities. These include, but are not limited to:

- Misrepresentation of any kind (e.g. origin of manufacture, specifications, intellectual property rights, etc.);
- Collusion;
- Failure to disclose accurate information required during the sourcing activity (ownership, financial situation, BBBEE status, etc.);
- Corrupt activities listed above; and
- Harassment, intimidation or other aggressive actions towards DBSA employees.

30. STATUS OF BID

30.1 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.

30.2 A Bid must not be conditional on:

- 30.2.1 the Board approval of the Bidder or any related governing body of the Bidder being obtained.
- 30.2.2 the Bidder conducting due diligence or any other form of enquiry or investigation.
- 30.2.3 the Bidder (or any other party) obtaining any regulatory approval or consent.
- 30.2.4 the Bidder obtaining the consent or approval of any third party; or
- 30.2.5 the Bidder stating that it wishes to discuss or negotiate any commercial terms of the contract.

- 30.3 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).
- 30.4 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.

31. CLARIFICATION OF BIDS

- 31.1 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 held 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.
- 31.2 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.

32. DISCUSSION WITH BIDDERS

- 32.1 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.
- 32.2 Where applicable, the DBSA will invite Bidders to give a presentation to the DBSA in relation to their submissions.
- 32.3 The DBSA is under no obligation to undertake discussions with, and Bidders.
- 32.4 In addition to presentations and discussions, the DBSA may request some or all Bidders to:
- 32.4.1 conduct a site visit, if applicable.
 - 32.4.2 provide references or additional information; and/or
 - 32.4.3 make themselves available for panel interviews.

33. SUCCESSFUL BIDS

- 33.1 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.

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

33.3 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.

34. NO OBLIGATION TO ENTER INTO CONTRACT

34.1 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.

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

35. BIDDER WARRANTIES

35.1 By submitting a Bid, a Bidder warrants that:

- 35.1.1 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;
- 35.1.2 it did not use the improper assistance of DBSA employees or information unlawfully obtained from them in compiling its Bid;
- 35.1.3 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;
- 35.1.4 it accepts and will comply with the terms set out in this RFP; and
- 35.1.5 it will provide additional information in a timely manner as requested by the DBSA to clarify any matters contained in the Bid.

36. DBSA'S RIGHTS

36.1 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:

- 36.1.1 cease to
- 36.1.2 in the Tendering Process.
- 36.1.3 require additional information or clarification from any Bidder or any other person;
- 36.1.4 provide additional information or clarification.

- 36.1.5 negotiate with any one or more Bidder;
- 36.1.6 call for a new Bid.
- 36.1.7 reject any Bid received after the Closing Time; or
- 36.1.8 reject any Bid that does not comply with the requirements of this RFP.

37. GOVERNING LAWS

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

PART E

TERMS OF REFERENCE

FOR

EMPLOYEE WELLNESS SERVICE PROVIDER

HUMAN CAPITAL

August 2025

1. INTRODUCTION

The Development Bank of Southern Africa (“the Bank”) is a Development Finance Institution (“DFI”) wholly owned by the Government of the Republic of South Africa (“the Shareholder”), with a mandate to finance infrastructure projects across Africa. The Bank has positioned itself as a Development Finance Institution (DFI) that champions and leads infrastructure integration and development. The Bank has sought to promote economic and social development by mobilising financial and other resources from the national and international, private, and public sectors for sustainable development projects in South Africa, the Southern African Development Community (SADC) region, and the entire African continent. In broad and aspirational terms, the Bank envisions a prosperous and integrated, resource-efficient region that is progressively free from poverty and dependency. For more information, please access the website at www.dbsa.org.

2. CONTEXT

The DBSA acknowledges that employees are its most valuable asset and is committed to promoting their holistic well-being. To this end, the DBSA seeks to implement a comprehensive employee wellness benefit that supports the physical, mental, and financial well-being of approximately 800 employees, including an approximate annual graduate cohort of around 40.

In the context of DBSA, employee wellness is a comprehensive approach that combines various support services, including the Employee Assistance Programme (EAP), Employee Wellness Programme (EWP), and other initiatives that address physical, mental and financial well-being. Together, these services create an integrated approach aimed at enhancing overall employee health, engagement, and productivity.

3. PURPOSE

The purpose of these Terms of Reference (ToR) is to appoint an accredited, credible, experienced, and Independent Service Provider (ISP) to implement a comprehensive suite of Employee Wellness (EW) services, which include an Employee Wellness Programme (EWP) and an Employee Assistance Programme (EAP). The ISP is expected to submit a comprehensive proposal detailing its EWP offering to support the DBSA in designing, implementing, and maintaining a robust wellness programme.

4. OBJECTIVES

The appointed ISP must provide professional, confidential, and personalised support services to DBSA for five (5) years, to enhance employee wellbeing and drive business performance. Services to be

provided include:

- Develop and recommend an appropriate Employee Wellness strategy and implementation plan.
- An Employee Assistance Programme (EAP) that provides confidential support and resources to help employees address personal or work-related issues.
- Track and manage employee wellness indicators to develop specific interventions, maintain strong employee well-being and proactively manages wellness-related risks.
- Implement and promote a customised wellness programme, clearly outlining available services to employees and their immediate family members.
- Provide prompt, short-term interventions following traumatic events.
- Improve organisational performance by ensuring employees have the necessary support structures to maximise their potential.
- sustained productivity.
- Equip employees with the resources, education, and support to actively manage their physical, mental, and emotional health.
- Design, organise, and execute wellness initiatives and events that foster a healthy, engaged, and resilient workforce.
- Collaborate with relevant DBSA stakeholders to ensure the successful execution of the strategy.
- Design a programme that addresses workplace and lifestyle behaviours, ensures confidentiality, and

5. SCOPE OF WORK

5.1. Strategy Development and Implementation

- Develop an integrated Employee Wellness strategy and implementation plan that promotes the holistic well-being of employees and enhances overall organisational effectiveness.
- Conduct a gap and needs analysis to inform the wellness strategic pillars and focus areas.
- Provide a benchmarking report against best practices in employee wellness.
- Provide a monitoring and evaluation framework, which includes, but is not limited to, employee feedback, identification of priority areas and usage patterns.
- Develop a communication and engagement plan to drive awareness and participation.
- Propose tools, platforms, and partnerships for effective delivery.

5.2. Employee Wellness Programme (EWP)

5.2.1. Programme Planning and Execution

- Develop and implement a holistic, appropriate employee wellness programme
- Implement the EWP with relevant DBSA stakeholders to ensure the successful execution of the plan.
- Provide an executive wellness programme, which takes into consideration the executive management's inherent occupational realities and potential risks.
- Develop a wellness calendar in collaboration with the wellness committee, consisting of initiatives and programmes, considering the national health calendar and addressing general wellness concerns raised by employees and or by the DBSA.
- Develop an implementation plan based on the wellness calendar initiatives, indicating the timelines, outputs, targets, methodology, and engagement strategy.

5.2.2. Wellness Programme Support Services

Attend monthly wellness committee meetings to discuss progress made on the implementation of the wellness initiatives, as well as the wellness calendar and assist with any matters/issues that need to be addressed.

These initiatives should include, but are not limited to, the following:

5.2.2.1 Annual Wellness Days and Events

- Provide guidance and support to the Wellness Committee during the planning and implementation of the Annual Wellness Days and Events.
- Provide employees with access to, among others, health screenings, health information stands (dietician, cancer awareness, biokinetics, and antioxidant screening, etc.), massages, manicures, pedicures, reflexology, etc. Employees should also have access to fun outside activities during the wellness event. Additionally, offer support during designated women's and men's health events, and administer flu vaccinations.

5.2.2.2 Targeted and Responsive Wellness Interventions

These initiatives are intentional, data-driven, and aligned with specific concerns identified in wellness monitoring reports. The ISP must provide recommendations to address these concerns through targeted and responsive wellness initiatives and interventions. These

initiatives may include, but are not limited to:

- **Mental Health Programme**

This programme must support employees with mental health and equip Line Managers with the necessary knowledge and tools on ways of how to deal with mental health issues in the workplace.

- **Financial Management Programme**

This programme should consist of individual and group sessions that will provide the necessary support and mechanisms to the employee to assist them in managing their debt, and by providing them with the opportunity to plan their financial future actively.

- **Burnout Prevention and Work-Life Balance Programme**

This programme must provide employees with practical ways to prevent and reduce the risk of burnout and improve work-life integration.

- **Ongoing Health Initiatives and Education**

Provide ongoing education and information to employees on health-related matters, e.g. healthy eating, exercising, etc.

5.3. Employee Assistance Programme (EAP)

Provide employees and their immediate family members a comprehensive and integrated EAP that ensures a seamless member experience encompassing mental, financial, social, physical and other factors that impact well-being. The member experience should consist of support services within the agreed-upon turnaround times as indicated in Annexure 1 and Annexure 2. This programme must include the following:

5.3.1. Accessibility of the Service

The service must be available and accessible to all employees and their immediate family members through various referral pathways:

- Self-referral, where the employee or family member seeks help on their own,
- Assisted referral where a Line Manager or co-worker recommends assistance, and
- Formal referral based on job performance and recommendation of the Line Manager.

- Provide 24 hours a day, 7 days a week and 365 days a year access to confidential psychological counselling services in all eleven (11) official South African languages.
- Provide a dedicated 24-hour toll-free number where employees and their immediate family members have access to the EAP at no cost.
- Guarantee that all employees and their immediate family members have access to psychological support via virtual platform counselling or in-person sessions, with access to in-person sessions near their place of residence or work.
- The EAP must include a minimum of six (6) counselling sessions per employee per issue.
- Provide bi-weekly face-to-face consultations where employees will be provided with information on the wellness service offering and be assisted with any queries or uncertainties.

5.3.2. Professional Standards and Qualifications

- Qualified and experienced professionals must provide dedicated support in managing workplace wellness challenges, including mental health concerns, trauma, stress, substance abuse, financial wellness, and behavioural coaching.
- Hold current registration with relevant professional bodies or councils.
- Bound by a professional code of ethics, with mechanisms for confidentiality, informed consent, and appropriate referrals.

5.3.3. Organizational Change Support

- Offer coaching support to line managers during organisational changes to equip them in handling sensitive and crucial conversations.
- Provide workshops and toolkits to help line managers recognise signs of distress and refer employees appropriately.
- Provide group sessions to equip employees with coping strategies, guidance, and tools for managing emotions and navigating ambiguity during organisational changes.
- Individual counselling (onsite or virtual) for employees facing job insecurity, change fatigue, or emotional distress.

5.3.4. Trauma or Critical Incident Response

- Provide immediate psychological and critical incident support after traumatic events.
- Group debriefing sessions or facilitated forums to process emotions and maintain team cohesion.
- Support for managers on how to respond to affected teams and maintain productivity during

recovery and post-incident

- Follow-up support to affected individuals and referrals where necessary.

5.4. Employee Awareness and Communication

Create awareness through innovative and effective ways about the EW services, benefits, and access channels that are available. This should include:

- Awareness campaigns to showcase EW offerings.
- Digital platforms such as mobile apps, intranet, SMS notifications and other technology-supported channels.
- Printed material, wallet cards, newsletters and desk-drops.
- Quarterly report feedback meetings with the DBSA Management and the Wellness Committee Members to present on identified issues and recommendations.
- Present at the quarterly induction programme, creating awareness of the EW service offering.
- Annual virtual sessions to promote awareness of the EWP and EAP services.
- Provide quarterly training and information sessions to all employees and Line Managers, reminding them of the EW service offering.
- Present at quarterly induction, informing employees of the EW service offering.

5.5. Line Management Support Services

- Provide training to line management on the EW service offering as well as case referral and management.
- Provide line managers with a managerial toolkit to support their employees with personal and work-related challenges when they impact an employee's performance and general well-being.
- Provide line management with support services on managing absenteeism and employee wellness matters.
- Guiding line managers in addressing employee challenges that may negatively affect organisational performance, including issues like non-performance, relationship management, and conflict resolution.

5.6. Integrated Platform

Provide access to a digital platform that is accessible anywhere, anytime, using any device, including a mobile device.

5.7. Reporting

- Provide quarterly and annual reports as per the DBSA financial year (1 April – 31 March) to management and the Wellness Committee with a comprehensive, accurate analysis and interpretation of trends, findings and recommendations.
- Provide status updates on the current matters/problems, employee utilisation rate, problems and risks presented, identified trends, service offerings accessed, etc.
- Recommendations must be made to Management and the Wellness Committee on possible initiatives and wellness campaigns that could be implemented to address the problem and risk areas identified in the report.

6. REQUIREMENTS FOR PARTICIPATING BIDDERS

Bidders must meet the following criteria:

- Registration with a recognised Professional Body, Employee Assistance Professionals Association of South Africa (EAPA-SA) or Health Professional Council of South Africa (HPCSA).
- Have a team of qualified and registered professionals with the recognised professional bodies.
- Reference letters detailing work done for other organisations of a similar size.
- A minimum of 10 years of experience in implementing and managing Employee Wellness Programmes and Employee Assistance Programmes in a corporate environment for medium to large enterprises with a minimum of 500 employees.
- Demonstrated experience in designing and managing wellness programmes for medium-to-large corporations.
- Demonstrate the capacity to implement the EWP fully for the duration of the contract.
- Provide quarterly and annual reports, including accurate analysis, interpretation of trends, and actionable recommendations using DBSA financial periods.
- Capability to deliver all services listed in the Scope of Work (Annexure 1 and Annexure 2).

7. EVALUATION CRITERIA

7.1 Prequalification/Mandatory criteria

- Adherence to submitting Tender as a two-folder tender. Folder 1: Functionality and returnable submission separate from Folder 2: Pricing proposal submission
- Attendance Register of the Compulsory Briefing Session attended by the Tenderer.

- The bidder is to provide proof of Professional Registration with the Health Professional Council of South Africa (HPCSA) and/or the Employee Assistance Professionals Association of South Africa (EAPA-SA).
- The service provider must provide evidence that their key personnel, allocated team resources and professionals are qualified. Key personnel allocated team resources, and qualified professionals should have a minimum of 10 years of experience each.

NB: The proposed team submitted in this RFP will be the team expected to deliver the required service unless otherwise agreed to by the DBSA.

Description	Team Members name	Team members Qualification	Professional Body Registration and Number	Proof attached (Yes/No)
Social Workers with a Degree in Social Work and registered with SACSSA.				
Clinical Psychologists with a Degree in the field of Psychology and registered with HPCSA (e.g. Clinical, Counselling, Education, Industrial, Research Psychologist);				
Lawyers with an LLB or equivalent qualification with admission as an Attorney/ Advocate with experience in litigation/advisory.				
Nurses with a basic R425 qualification, registered with SANCA and with				

experience as a professional nurse.				
Financial Advisors with a National Diploma or B Degree in Accounting/Financial Management/ Cost Management Accounting with experience as a Financial Advisor.				
Occupational Health Practitioners with a relevant SAQA-accredited OHS qualification.				

7.2 Functional evaluation criteria

The following functional criteria will be utilised to test the service provider's capability to deliver on the Terms of Reference (ToR). Bidders who score a **minimum of 75% for the evaluation criteria** during the functional evaluation will proceed to the next evaluation stage.

Evaluation Categories	Criteria / Questions / Guidelines	Max Points	Min Points
1. Track Record		45	36
Client Reference Letters	<p>Provide three (3) reference letters from contactable references signed by a duly authorised person on the company's letterhead with contact details (name, email address and telephone number).</p> <ul style="list-style-type: none"> Each letter must include a description of employee wellness services rendered to clients; specify the duration of the experience in years and indicate a detailed description of actual services provided. The reference letters cannot be older than five (5) years and must be from a medium to large entity. 	15	12

	<ul style="list-style-type: none">Only fully compliant reference letters with the above requirements will be considered. <table><tr><td>3 contactable references validating the nature of the terms/tenure, of EW services.</td><td>15 Points</td></tr><tr><td>2 contactable references validating the nature of the term/tenure of EW services.</td><td>12 Points</td></tr><tr><td>1 contactable reference validating the nature of the term/tenure of EW services.</td><td>10 Points</td></tr><tr><td>No contactable references provided.</td><td>0 Points</td></tr></table>	3 contactable references validating the nature of the terms/tenure, of EW services.	15 Points	2 contactable references validating the nature of the term/tenure of EW services.	12 Points	1 contactable reference validating the nature of the term/tenure of EW services.	10 Points	No contactable references provided.	0 Points		
3 contactable references validating the nature of the terms/tenure, of EW services.	15 Points										
2 contactable references validating the nature of the term/tenure of EW services.	12 Points										
1 contactable reference validating the nature of the term/tenure of EW services.	10 Points										
No contactable references provided.	0 Points										
Company Track Record & Experience in delivering <u>Employee Wellness Programmes</u>	<p>The Bidder must demonstrate experience in successfully developing and implementing an employee wellness programme for medium or larger organisations. A concise summary report and portfolio of evidence must be provided detailing the previous work done for the various organisations. Refer to Annexure B for the format to be used.</p> <table><tr><td>10+ years of demonstrated experience delivering wellness programmes.</td><td>15 Points</td></tr><tr><td>5 - 9 years of demonstrated experience delivering wellness programmes.</td><td>12 Points</td></tr><tr><td>< 4 years of demonstrated experience delivering wellness programmes.</td><td>0 Points</td></tr></table>	10+ years of demonstrated experience delivering wellness programmes.	15 Points	5 - 9 years of demonstrated experience delivering wellness programmes.	12 Points	< 4 years of demonstrated experience delivering wellness programmes.	0 Points	15	12		
10+ years of demonstrated experience delivering wellness programmes.	15 Points										
5 - 9 years of demonstrated experience delivering wellness programmes.	12 Points										
< 4 years of demonstrated experience delivering wellness programmes.	0 Points										

Company Track Record & Experience in delivering <u>Employee Assistance Programmes</u>	<p>The Bidder must demonstrate experience in successfully developing and implementing an employee assistance programme for medium or larger organisations. A concise summary report and portfolio of evidence must be provided detailing the previous work done for the various organisations. Refer to Annexure B for the format to be used.</p> <table><tr><td>10+ years of demonstrated experience delivering employee assistance programmes.</td><td>15 Points</td></tr><tr><td>5 – 9 years of demonstrated experience delivering employee assistance programmes.</td><td>12 Points</td></tr><tr><td><4 years of demonstrated experience delivering employee assistance programmes.</td><td>10 Points</td></tr></table>	10+ years of demonstrated experience delivering employee assistance programmes.	15 Points	5 – 9 years of demonstrated experience delivering employee assistance programmes.	12 Points	<4 years of demonstrated experience delivering employee assistance programmes.	10 Points	15	12
10+ years of demonstrated experience delivering employee assistance programmes.	15 Points								
5 – 9 years of demonstrated experience delivering employee assistance programmes.	12 Points								
<4 years of demonstrated experience delivering employee assistance programmes.	10 Points								
2. Team Experience		25	18						
Experience of allocated personnel	<p>Demonstrated skills and relevant experience in carrying out services in medium or larger organizations.</p> <p>Key Personnel and allocated Team Resources should have a minimum of 10 years of experience each. Allocated Team resources with less than the required minimum years of experience will not be considered.</p> <p>The service provider must provide evidence that they have qualified professionals, including Key Account Managers, Social Workers, Nurses, Clinical Psychologists, Lawyers, Occupational Health Practitioners, and Financial Advisors, with a minimum of 10 years of experience each.</p> <p>Provide an organogram and a two-page resume of each team resource assigned to this project, providing evidence of qualifications, professional bodies, and the number of years rendering similar services.</p> <table><tr><td>15+ years of demonstrated experience for each member, and all information requested above was provided</td><td>25 Points</td></tr><tr><td>10 - 14 years of demonstrated experience for each member, and all information requested above was provided</td><td>18 Points</td></tr><tr><td><9 years of demonstrated</td><td>0 Points</td></tr></table>	15+ years of demonstrated experience for each member, and all information requested above was provided	25 Points	10 - 14 years of demonstrated experience for each member, and all information requested above was provided	18 Points	<9 years of demonstrated	0 Points	25	18
15+ years of demonstrated experience for each member, and all information requested above was provided	25 Points								
10 - 14 years of demonstrated experience for each member, and all information requested above was provided	18 Points								
<9 years of demonstrated	0 Points								

	experience for each member, and all information requested above was provided.			
3. Methodology and Approach			20	15
Methodology and Approach	Provide a methodology and approach that aligns with the scope of work (SOW) and requirements of the EAP and EWP. Demonstrate customisation/understanding of the DBSA needs and bidder to provide a solution in line with the scope of work (section 5) above. Bidder must provide a proposed 24/7/365 support procedure that includes the following services: toll-free telephonic counselling, physical wellbeing, emotional wellbeing, financial wellbeing, and social wellbeing. This includes digital platforms, communication channels and tools.		20	15
	Could provide an exceptionally (100%) detailed and all-encompassing methodology for the SOW and/requirements above.	20 points		
	Could provide satisfactory proof (70%-90%) of the methodology that will be applied as per the SOW.	15 Points		
	Could provide limited proof (40%-60%) of the methodology that will be applied based on the above requirements/SOW	10 Points		
	The bidder provided a generic document and/or could not provide a methodology and approach.	0 Points		
4. Employee Wellness Service Support			10	6
	Bidder to provide a case study to demonstrate how efficiently employees will receive support in terms of the employee wellness service offerings.		10	6

	<p>The bidder must provide evidence of the following:</p> <ul style="list-style-type: none"> • A strategic communication plan = 2 points • Reporting mechanism including solutions to address identified problem areas = 2 points • Provide proof of turnaround times as referenced in the scope of work (section 5) and Annexure 2 = 2 points • Provide other wellness support services / ad-hoc initiatives that can be provided as referred to in paragraph 5.3 above = 2 points • The service offering is in line with the requirements as referred to in the scope of work (paragraphs 5.1 and 5.2) and Annexure 1 = 2 points 			
	Could provide satisfactory proof - provided all of the service offerings as per the above requirements.	10 Points		
	Could provide partial proof - missing some of the requirements of the service offering as per the above requirements.	6 Points		
	• Could not provide proof.	0 Points		
Total Score			100	75

The bidder must score at least the minimum scores on each criterion to be considered.

Bidders who score **75% out of 100%** will proceed to the evaluation of Pricing and BBEE.

8. Time frames, Duration and Training Platform

Upon successful appointment, the Service Provider is expected to commence work within one calendar month of being awarded the contract.

9. Management and Reporting

The Service Provider shall report to the designated Line Manager and Employee Wellness Coordinator for Wellness within the Human Capital Division.

10. Reservations

The DBSA expressly reserves the following rights:

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

11. 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 copyrights, patents and registered trademarks on matters directly related to or derived from the work carried out through this contract.

ANNEXURE A: Pricing Schedule

As per the Scope of Work (Paragraph 5)

Item	Details of services included in quotation	Estimated Cost per employee per year
Strategy Development and Implementation(Paragraph 5.1)		
Employee Wellness Programme (EWP): (Paragraph 5.2)		
- Programme Planning and Execution		
- Wellness Programme Support Services		
Employee Assistance Programme (EAP): (Paragraph 5.3)		
- Accessibility of the Service		
- Professional Standards and Qualifications		
- Organisational Change Support		
- Trauma or Critical Incident Response		
Employee Awareness and Communication (Paragraph 5.4)		
Line Management Support Services (Paragraph 5.5)		
Integrated Platform (Paragraph 5.6)		
Reporting (Paragraph 5.7)		
Cost per Employee per Annum		
Plus VAT		
Total Cost		

ANNEXURE B: DEMONSTRATED TRACK RECORD AND EXPERIENCE OF THE SERVICE PROVIDER

Client/Customer Name	Years of Relevant Experience	Role / Duties in this Project	Relevant Project Experience	Organisational Size
			Project description, Client, Project period, Year Completed, Monetary Value.	
1. Company Track Record & Experience in delivering Employee Wellness Programmes:				
Demonstrate experience in successfully developing and implementing an employee wellness programme for medium or larger organisations on at least 3 Projects.				
2. Company Track Record & Experience in delivering Employee Assistance Programmes:				
Demonstrate experience in successfully developing and implementing an employee assistance programme for medium or larger organisations on at least 3 projects.				

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 interest 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.

Full Name	Identity Number	Name of State institution

SBD 4

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**

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 consortium 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.

SBD 4

- 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.

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.

..... Signature Date
..... Position Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- 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 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) The **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals (namely, BBBEE status level of contributor).

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
PREFERENCE POINTS	20
Total points for Price and Preference Points	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

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

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

80/20

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

- Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by	Number of points allocated (80/20 system) (To be completed by	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
---	--	--	--	--

	the organ of state)	the organ of state)		
1	10	20		
2	9	18		
3	6	14		
4	5	12		
5	4	8		
6	3	6		
7	2	4		
8	1	2		
Non-compliant contributor	0	0		

(Note: Bidders are required to submit their BBBEE certificates or sworn affidavits (in the case of EMEs/QSEs) in order to be eligible to claim points)

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I 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 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:.....

ADDRESS:.....

.....

.....
.....

RESTRICTED SUPPLIERS

- 1 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>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 <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	<p>Yes</p> <p><input type="checkbox"/></p>	<p>No</p> <p><input type="checkbox"/></p>

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)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	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:		

Annexure E

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

Annexure F

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

Annexure G

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

Annexure H

Bidders are required to include, as Annexure H 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 I

[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 ACQUAINTED 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?		

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
Free Post : Free Post KZN 665 | Musgrave | 4062
SMS : 33490