



REQUEST FOR PROPOSALS

<p>YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED</p>	
<p>BID NUMBER:</p>	<p>RFP079/2026</p>
<p>COMPULSORY BRIEFING SESSION DETAILS:</p>	<p>Tender briefing will be done online via Microsoft teams. Bidders are advised to use the link below to join the briefing session.</p> <p>Click on the link to join the meeting. Bidders must complete their details fully in order to have access to the briefing session. The link will only be accessible 15 minutes before the meeting.</p> <p>Compulsory Briefing Session link - RFP079.2026</p> <p>Link: 06 May 2026 @11H00 AM (Johannesburg time)</p>
<p>CLOSING DATE:</p>	<p>19 May 2026</p>
<p>CLOSING TIME:</p>	<p>23H55 (Midnight)</p>
<p>PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:</p>	<p>120 days</p>
<p>DESCRIPTION OF BID:</p>	<p>PROCUREMENT OF COST BENEFIT/COST EFFECTIVENESS AND SOCIO-ECONOMIC IMPACT ASSESSMENT SPECIALISTS FOR THE BUDGET FACILITY FOR INFRASTRUCTURE SUBMISSIONS FOR PROJECT SPONSORS PARTNERING WITH THE INFRASTRUCTURE FINANCE AND IMPLEMENTATION SUPPORT AGENCY</p>
<p>BID DOCUMENTS ELECTRONIC SUBMISSION:</p>	<p>1. ELECTRONIC SUBMISSIONS</p> <p><u>INSTRUCTIONS:</u></p>

	<ul style="list-style-type: none"> ➤ Bidders are required to submit written requests for clarification via e-mail to vusiscm@dbsa.org ONLY, quoting the RFP Number on the subject of the e-mail. This must be done three (3) working days before submission day. ➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically. ➤ Written requests for clarification will be considered up to and including 15 May 2026 16:30 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 Closing date of this 19/05/2026 is before 23:55.</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	

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**PART A
INVITATION TO BID**

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

BID NUMBER: RFP079/2026

DESCRIPTION: **PROCUREMENT OF COST BENEFIT/COST EFFECTIVENESS AND SOCIO-ECONOMIC IMPACT ASSESSMENT SPECIALISTS FOR THE BUDGET FACILITY FOR INFRASTRUCTURE SUBMISSIONS FOR PROJECT SPONSORS PARTNERING WITH THE INFRASTRUCTURE FINANCE AND IMPLEMENTATION SUPPORT AGENCY**

COMPULSORY BRIEFING: **06 May 2026** - Tender briefing will be done online via Microsoft teams.

COMPULSORY BRIEFING LINK:

Time: 11H00 AM Johannesburg time (**Microsoft Teams**)


[Compulsory briefing session - RFP021.2026](#)

Closing time for the OneDrive Link submissions - **23h55 on the 19 May 2026 (Telkom Time)**


CLOSING DATE: 19 May 2026

CLOSING TIME: 23H55

Name

 Bidder Name

Name

 Folder 1_Financial Proposal

 Folder 2_Technical Proposal

- 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 Bidders 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	

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.)				
BBBEE STATUS LEVEL VERIFICATION CERTIFICATE /BBBEE STATUS LEVEL SWORN AFFIDAVIT SUBMITTED? [TICK APPLICABLE BOX]	YES		NO	
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:	
1.1.	BIDS MUST BE SUBMITTED ELECTRONICALLY BY THE STIPULATED TIME TO THE LINK PROVIDED. 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)
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.
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.
2. TAX COMPLIANCE REQUIREMENTS	
2.1	ALL BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS IN THEIR COUNTRY OF RESIDENCE.
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.
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.
2.4	SA 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 (TAX COMPLIANCE) IN ACCORDANCE WITH APPLICABLE LEGISLATION IN THEIR COUNTRY OF RESIDENCE.
2.6	WHERE SA BIDDERS HAVE NO TCS AVAILABLE BUT ARE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
<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.</p>	

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

PART C

CHECKLIST OF 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 annexes 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: SBD4 Declaration of Interest
<input type="checkbox"/>	<input type="checkbox"/>	Annexure C: SBD6.1 and B-BBEE status level certificate
<input type="checkbox"/>	<input type="checkbox"/>	Annexure F: Certified copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation
<input type="checkbox"/>	<input type="checkbox"/>	Annexure G: Certified copies of latest share certificates, in case of a company.

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

Annexure I: Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria.

Annexure J: General Condition of Contract

Annexure K: 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** means the time, specified as such under the clause (Bid Timetable) in Part C, by which Tenders must be received.
- 1.10 **DBSA** means the Development Bank of Southern Africa Limited.
- 1.11 **DFI** means Development Finance Institution.
- 1.12 **Evaluation Criteria** means the criteria set out under the clause 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 26.3 of this Part C.
- 1.19 **Price and Preferential Points Assessment** means the process described in clause 26.5 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: vusiscm@dbsa.org

No questions will be answered telephonically

4. SUBMISSION OF TENDERS

COMPULSORY BRIEFING: **06th May 2026** - Tender briefing will be done online via Microsoft teams.

Click on the link to join the meeting. Bidders must complete their details fully in order to have access to the briefing session. The link will only be accessible 15 minutes before the meeting.

[Compulsory Briefing Session link - RFP079.2026](#)

Link: 06 May 2026 @11H00 AM (Johannesburg time) Time: 11H00 AM Johannesburg time
(Microsoft Teams)

LINK REQUESTS: Bidders are asked to nominate one dedicated contact person (name, email address and phone number).

Link Request DATE By: **15 May 2026**

Link Request TIME By: 16H30

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 vusiscm@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 effect the fairness of the Tendering Process.

21. OBLIGATION TO NOTIFY ERRORS

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

22. RESPONSIBILITY FOR BIDDING COSTS

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

22.2.2 the DBSA exercises any right under this RFP or at law.

23. DISCLOSURE OF BID CONTENTS AND BID INFORMATION

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

23.1.1 as required by law;

23.1.2 for the purpose of investigations by other government authorities having relevant jurisdiction;

23.1.3 to external consultants and advisors of the DBSA engaged to assist with the Tendering Process; or for the general information of Bidders required to be disclosed as per National Treasury Regulations, Guidelines, Instruction Notes or Practice Notes.

24. USE OF BIDS

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

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

25. BID ACCEPTANCE

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

26. EVALUATION PROCESS

26.1 The Bids will be evaluated and adjudicated as follows:

26.1.1 **First Stage – Test for administrative Responsiveness**

The test for administrative responsiveness will include the following:

Stage 1: Responsiveness

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

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

Responsiveness Criteria		Prequalifying Criteria	Applicable to this Tender (Y/N)
1	Adherence to submitting Tender as a two-folder tender. Folder 1: Functionality and returnable submission separate from Folder 2: Pricing proposal submission	Pre-Qualifier	Y
2	Attendance of the compulsory briefing session	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.	48 hours	Y
2	Returnable documents completed and signed.	48 hours	Y
3	Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be registered to do business with the DBSA	48 hours	Y
4	A Tax Pin issued by SARS.	48 hours	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 – Functional evaluation criteria**

- 26.1.1 Only those Bidders that meet the minimum threshold of **80%** for functional evaluation criteria during the Second Stage will be evaluated further. Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable.

Bidders will be assessed on the functional evaluation criteria (Second Stage) as set out in this RFP. Only those Bidders that meet the minimum threshold of **80%** for functional evaluation criteria will proceed to the Third Stage.

26.1.2 **Third Stage – price**

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

- 26.1.2.2 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 J to their Bids, any documentation which supports the responses provided in respect of the Eligibility Criteria below**

26.3 **First Stage: Pre-Qualifying Criteria**

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

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

26.4 **Second Stage: Functional Evaluation Criteria**

Minimum score of **80 out of 100** in each of the evaluation criteria as well as overall is required to progress to next stage.

Table 2: Functionality Criteria –

No.	Evaluation Criteria	Scoring for whole element	Weight	Score
1	Lead Cost Benefit Analysis/Cost Effectiveness Analysis Expert		40 out of 100	
1.1	A Cost Benefit Analysis/Cost Effectiveness Analysis (CBA/CEA) Lead Expert with a postgraduate degree in Development Finance or Economics or Econometrics or Statistics or related field.	Master's Degree or above (NQF 9+): 5 points Honours Degree (NQF 8): 3 points Less than Honours Degree (NQF 8): 0 point	5	
1.2	Extensive experience in CBA/CEA in water and sanitation or transportation or human settlements or telecommunications or energy or agriculture and agro-processing or health or education infrastructure projects.	20+ years: 15 points 15-20 years: 10 points 11-14 years: 5 points 8-10 years: 3 points Anything below 8 years is 0	15	
1.3	Projects undertaken by the Lead Expert using CBA/CEA methodology (current and/or past) in sectors specified in 1.2 above. Only infrastructure projects with a value of R1 billion or more and have successfully secured funding from the BFI or from Multilateral Development Banks will be considered.	7+ projects: 20 points 6-7 Projects: 15 points 4-5 Projects: 10 points 2-3 Projects: 5 Points 1 project: 3 points	20	
2	Cost Benefit Analysis/Cost Effectiveness Analysis Specialist		30 out of 100	
2.1	A Cost Benefit Analysis/Cost Effectiveness Analysis (CBA/CEA) Specialist with a degree in Development Finance or Economics or Econometrics or Statistics or related field.	Master's Degree or above (NQF 9+): 5 points Honours Degree (NQF 8): 3 points Less than Honours Degree (NQF 8): 0 point	5	
2.2	Experience in CBA/CEA in water and sanitation or transportation or human settlements or telecommunications or energy or agriculture and agro-processing or health or education infrastructure projects.	10+ years: 10 points 8-9 years: 8 points 6-7 years: 5 points 4-5 years: 3 points Anything below 4 years is 0	10	
2.3	Projects undertaken by the Specialist using CBA/CEA methodology (current and/or past) in sectors specified in 2.2 above. Only infrastructure projects with a project value of R1 billion or more and have successfully secured funding from the BFI or from Multilateral Development Banks will be considered.	4+ projects: 15 points 3 Projects: 10 points 1-2 Projects: 5 points Anything below 1 project: 0 points	15	
3.	Socio-Economic Impact Assessment Specialist (SEIA)		20 out of 100	

No.	Evaluation Criteria	Scoring for whole element	Weight	Score
3.1	A Socio-Economic Impact Assessment Specialist (SEIA) with a degree in Development Finance or Economics or Econometrics or Statistics or related field.	Master's Degree or above (NQF 9+): 5 points Honours Degree (NQF 8): 3 points Less than Honours Degree (NQF 8): 0 point	5	
3.2	Experience in SEIA in water and sanitation or transportation or human settlements or telecommunications or energy or agriculture and agro-processing or health or education infrastructure projects.	10+ years: 5 points 8-9 years: 3 points 4-7 years: 1 point Anything below 4 years is 0	5	
3.3	Projects undertaken by the Specialist using SEIA methodology (current and/or past) in sectors specified in 3.2 above. Only infrastructure projects with a project value of R1 billion or more and have successfully secured funding from the BFI or from Multilateral Development Banks will be considered.	4+ projects: 10 points 3 Projects: 8 points 1-2 Projects: 5 points Anything below 1 project: 0 points	10	
Project implementation Methodology and Skills Transfer and Capacity Plan			10 out of 100	
4.	Comprehensive and credible project methodology and project plan to execute the assignment within the specifications and timelines.	Excellent: Detailed and robust methodology = 5 points Good: Semi – detailed methodology and plan = 3 points Poor and unclear methodology and plan = 0 point	5	
5.	A plan for skills development, transfer and capacity value added to IFISA and Project Sponsors.	Excellent: Detailed and comprehensive, methodical and time-based skills transfer plan = 5 points Good: Semi detailed and less comprehensive, methodical and time-based skills transfer plan = 3 points Inadequate, untimed skills transfer plan = 0 points	5	
TOTAL			100	
MINIMUM THRESHOLD			80	

NB: NO INDIVIDUAL CAN BE EVALUTED FOR MORE THAN 1 ROLE, IT IS A REQUIREMENT TO HAVE A RESOURCE FOR EACH OF THE ROLES PROPOSED.

ONLY BIDS WHICH SATISFY ALL THE ABOVE ELIGIBILITY AND FUNCTIONALITY CRITERIA (STEP 1 & 2) WILL BE EVALUATED ON PRICING

IT IS RECOMMEND TO LIST MORE THAN THE MINIMUM REQUIRED NUMBER OF PROJECTS TO SAFEGUARD AGAINST DELISTING OF PROJECT DUE TO INCOMPLETENESS.

Subcontracting

26.5 Third Stage: Price

26.5.1 The Third Stage of evaluation of the Bids will be in respect of price and preference.

27. 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 includes:

- I. Any bidder that has a cumulative order book totalling 5 Awards with outstanding value, may be excluded from further evaluation.
- II. Where a bidder has 5 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 5 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's 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's 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 proceed with or suspend the Tendering Process prior to the execution of a formal written contract.
 - 36.1.2 alter the structure and/or the timing of this RFP or the Tendering Process;
 - 36.1.3 vary or extend any time or date specified in this RFP
 - 36.1.4 terminate the participation of any Bidder or any other person in the Tendering Process.
 - 36.1.5 require additional information or clarification from any Bidder or any other person;
 - 36.1.6 provide additional information or clarification.
 - 36.1.7 negotiate with any one or more Bidder;
 - 36.1.8 call for new Bid.
 - 36.1.9 reject any Bid received after the Closing Time; or
 - 36.1.10 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).

TERMS OF REFERENCE (TOR)

PROCUREMENT OF COST BENEFIT/COST EFFECTIVENESS AND SOCIO-ECONOMIC IMPACT ASSESSMENT SPECIALISTS FOR THE BUDGET FACILITY FOR INFRASTRUCTURE SUBMISSIONS FOR PROJECT SPONSORS PARTNERING WITH THE INFRASTRUCTURE FINANCE AND IMPLEMENTATION SUPPORT AGENCY

1. INTRODUCTION AND BACKGROUND

Every year, the National Treasury (NT) issues calls for proposal inviting public sector institutions to submit infrastructure proposals for consideration by the Budget Facility for Infrastructure (BFI). Central to the call for proposal is a focus on infrastructure investment to promote growth and social development in a sustainable manner. The BFI is a budget reform initiative established to support priority infrastructure projects through a more rigorous project planning, appraisal, and selection process. The intention is to support large infrastructure projects with significant and enhanced outcomes and improved value for money to government. It requires that projects have sustainable financial arrangements and effective development and execution capacity.

The National Treasury utilises the BFI mechanism to develop a pipeline of projects to test alternative financing and funding models. The intention is to use government's resources more efficiently to leverage financing and funding from sources other than fiscal resources. This includes private sector financiers and funders, Development Finance Institutions (DFIs), International Finance Institutions (IFI's) and commercial funders. The primary purpose of the BFI is to close funding gaps and provide viability gap funding for two types of proposals:

- a) Projects and programmes that can or have already secured private, development or related financing but require additional funding to address a viability gap.
- b) Projects and programmes that have not yet secured private, development or related financing and require support to structure a financing arrangement.

The Infrastructure Fund (IF) which has transitioned to The Infrastructure Finance and implementation Support Agency (IFISA) has been participating in the BFI over the past 5 years and as a result, secured over R50 billion for 26 blended finance projects with a capital value of over R130 billion. From 2025 onwards, the NT plans to issue calls for proposal for the BFI on a quarterly basis. Therefore, the IFISA requires a company to undertake or develop 50 cost benefit/cost effectiveness analysis and socio-economic impact assessment studies over a 5-year period. The 2025 BFI guidelines as well as the Infrastructure Planning and Appraisal Guidelines are attached in Appendixes A and B respectively for your ease of reference.

INFRASTRUCTURE FINANCE AND IMPLEMENTATION SUPPORT AGENCY

The Infrastructure Finance and implementation Support Agency (IFISA) was established through a tripartite Memorandum of Agreement (MOA) in January 2026, and became operational on 01 April 2026. IFISA consolidates the Public-Private Partnerships (PPP) and the Capital Projects Appraisal Units of the Government Technical Advisory Centre, the Neighbourhood Development Partnership Programme of the National Treasury and the Infrastructure Fund.

IFISA is a Project Management Office located in the DBSA that has been established as a single structure that will systematically crowd-in private sector participation to augment the limited public sector capacity, capability, and finances. IFISA will prepare a robust and continuous pipeline of investable projects, structure financial arrangements to reduce reliance on fiscal funding and promote alternative funding, financing and delivery mechanisms.

Functions and Objectives of IFISA

- a. Undertake infrastructure and investment planning activities to support social inclusion while address spatial inequality, economic growth and sustainable development;
- b. Prepare a robust, continuous and investable pipeline of infrastructure projects and programmes, integrate the coordination and management of such a pipeline;

- c. Facilitate project preparation funding including from donors, development financiers and philanthropic organisations;
- d. Structure the financing arrangements to reduce reliance on fiscal funding, promote the use of alternative funding, financing and delivery models to catalyse non-government funding and reduce fiscal exposure in infrastructure development;
- e. Strengthen the independent review of proposals before they are channeled to the BFI for consideration by budget authorities;
- f. Facilitate the raising of funds for infrastructure Projects and programmes;
- g. Enhance technical assistance and transaction advisory support to advance infrastructure projects including through PPP stage approvals, ensure effective procurement support, appropriate risk sharing and unlocking of investments in precincts and key nodes;
- h. Improve spending outcomes through effective grant management function, continuous monitoring, timely adjustments, and transparent reporting;
- i. Provide policy advisory and analytical services, intergovernmental convening, and support to reforms;
- j. Improve information and data management to enhance accessibility, inform decision making and support knowledge management;
- k. Provide quality assurance support to National Treasury including independent verifications, monitoring and evaluation, and ex post assessments;
- l. Provide technical capacity to build state capability, incentive behavioral change and improve infrastructure, investment and spending outcomes while promoting efficient asset management; and
- m. Enhancing support to sponsors beyond financial structuring and closure to ensure effective procurement, risk sharing and delivery of infrastructure.

For more information on the IFISA, please visit the website: <https://www.ifisa.co.za/>

2. PROJECT DESCRIPTION

The BFI issues quarterly call for proposals to invite submissions from public institutions in respect of projects and programmes that fall within a certain criterion. Institutions that qualify to submit proposals include National, Provincial and Municipal spheres of government as well as Public Entities. The Call for Proposals is also open to Public-Private Partnership (PPPs) arrangements that have completed feasibility studies and received Treasury Approval I (TA I) or Treasury Views and Recommendations I (TVR I).

To be eligible projects and programmes must meet the following criteria:

Table 1: BFI Eligibility Criteria

Type	A	B
Description	<i>Projects that can or have already secured private, development or related financing – but require additional funding to address a viability gap.</i>	<i>Projects that have not yet secured private, development or related financing and require support to structure a financing arrangement.</i>
Minimum Total Project / Programme Cost ³	R 1 billion	
Targeting	Should support economic growth, social equity, and employment creation.	
Project Readiness	Must have completed a full Feasibility Study or the equivalent. With fiscal support over the 2025 MTEF will reach financial close or bankability.	
Special Conditions	Must demonstrate potential financing interest from private or DFI parties. Projects must prove financial viability and sustainable revenue streams, demonstrated through an appropriate financial model.	Must demonstrate the potential for the project to take on private, development or related financing.

The IFISA together with project sponsors plan to submit projects to the BFI in 2026 and beyond. The cost benefit analysis/ cost effectiveness analysis and socio-economic impact assessment studies must be done in accordance with the Infrastructure Planning and Appraisal Guideline¹ (See Appendix B). The Guideline sets out a standardised approach to conducting socio-economic analysis using appropriate and uniform methodologies. It further outlines the principles and criteria that should be used to conduct either a cost benefit analysis or a cost effectiveness analysis.

The National Treasury pre-screens all submissions for alignment with the set criteria. Only proposals that meet the criteria and provide adequate information will be considered for detailed technical assessment. An independent analysis of the proposals' financial viability, value-for-money, socio economic rationale, affordability, risk profile and implementation readiness will be carried out during the detailed technical assessment. The assessment will make recommendations on the technical merits and risks of proposals to the Joint Technical Committee of the BFI. Proposals that are recommended for fiscal support by the Joint Technical Committee of the BFI will be allocated funding.

3. SCOPE OF WORK

The scope of work includes analysis that quantifies the economic costs and benefits associated with the preferred option(s) using either a cost-benefit (CBA) or cost effectiveness analysis (CEA) to determine the economic viability and sustainability of the project. This analysis is critical to justify fiscal support. The Infrastructure Planning and Appraisal Guideline provides details on the CBA and CEA methodologies. Broadly, a CBA is employed when the impacts of a project/programme can be monetised, as with most economic infrastructure projects. It seeks to establish whether a particular investment is the most efficient use of society's resources. On the other hand, a CEA is typically used for social projects/programmes where

¹<https://www.treasury.gov.za/publications/guidelines/Infrastructure%20Planning%20and%20Appraisal%20Guideline.pdf>

benefits are difficult to quantify, or it is inappropriate to quantify these. A CEA assesses each option on its relative costs to select the least costly option(s), or the option(s) that has the least cost per unit of benefit (assuming the benefits are the same across the options).

The scope of work to be undertaken by the Specialists is described below. The successful service provider is required to prepare a comprehensive socio-economic analysis report covering the following:

1. Review of the socio-economic profiles of the location of projects and confirmation of demand;
2. Assessment of the socio-economic impacts of the projects on the local and national economies;
3. Justification for fiscal support for the projects through a credible analysis and assessment of social and economic costs and benefits of the projects as per the BFI guideline methodology;
4. Provision of information that enables an assessment of welfare changes due to the implementation of the projects and estimation of the projects' impacts on all segments of society as measured by the calculation of economic performance indicators such as the Economic Net Present Value (ENPV), Economic Rate of Return (ERR) and Cost-Effective Ratio (CER);
5. Provision of a scientific method of demonstrating economic costs and benefits of a project through CBA and/or CEA to assess their socio-economic viability;
6. Policy alternatives and measure the economic impact of the projects against a "do nothing" scenario on all the alternatives;
7. Review of projects' delivery options and conducting a CBA and or/ CEA for the preferred option;
8. Identification, quantification, categorisation and timing of impacts, and costs and benefits. The Specialists needs to identify the impact of the preferred option under consideration, categorise the impact as costs or benefits;
9. Comparison of benefits with costs using the social discount rate (SDR). The costs and benefits of the preferred option must be discounted using a selected SDR to bring future values into their present-day equivalent; and
10. Demonstration of distributional impact(s) in relation to the accrual of gains or losses to different stakeholder groups from the implementation of the project.

To complement the CBA and CEA, a socio-economic impact assessment that evaluates wider and distributional impact should be included, using tools such as social accounting matrix, input-output model, or computable general equilibrium models. These tools can show each option's contribution to the economy and society by considering variables such as job creation, gross domestic product impacts, or analysis of impacts on the marginalised and vulnerable members of society, amongst others. These tools are also useful for understanding the distributional impacts of the project.

The intension is not for the consultants to undertake feasibilities but to use existing documents and package funding applications with the Project Sponsors for compliance with the BFI requirements. The IFISA will oversee the reports of the consultants to ensure compliance and propose its value proposition and address any intergovernmental requirements. Detailed information is contained in the BFI Guidelines attached

In addition to the scope described above, the successful bidder is required to undertake skills transfer and capacity building.

Skills Transfer

The successful bidder shall provide practical, on-the-job training to five (5) employees of the IFISA, or to individuals nominated by the IFISA, for the full duration of the contract.

The bidder must ensure that each employee is adequately exposed to the various components of the assignment and/or scope of services to enable meaningful skills development and knowledge transfer.

Capacity Building

The successful bidder shall schedule and deliver a minimum of eight (8) hours of training/workshop for IFISA and its partners each year of the contract.

The training may be delivered either by the successful bidder or by an external training provider, as arranged and fully funded by the bidder. The bidder's pricing structure must make a provision for this requirement.

The training programme must be structured to ensure effective capacity building aligned with the objectives and scope of the contract.

The bidder would be expected to cover the following topics

- Financial Modeling
- Risk Analysis and Project Finance
- Economic Analysis
- Environmental Analysis
- Stakeholder Impact Assessment

4. PROJECT PERIOD

The contract period is expected to take 60 months. However, conducting a CBA/CEA and SEIA of each submission is expected to take approximately 1 to 3 months within any given window of funding applications.

5. EXPERTISE AND EXPERIENCE

Demonstration of Skills and Experience

The bidder must be able to demonstrate a comprehensive understanding of cost benefit/cost effectiveness analysis as well as the ability to undertake wider economic impact assessment in line with the BFI requirements and have proven experience in putting together socio-economic analysis reports that have been submitted to the National Treasury and received a positive outcome. The Specialists must have expertise and experience in the following areas:

- Financial analysis and modelling;
- Economic/socio -economic analysis;
- Cost-benefit analysis; and
- Cost-effectiveness analysis.

CVs of the specialists with a clear indication of which specialist role the individual will play on the project, namely;

- i. Lead CBA/CEA Expert;
- ii. CBA/CEA Specialist; and
- iii. SEIA specialist.

The CVs must clearly state the individual's relevant qualifications including the national qualification level. All international qualifications will need to be verified through a SAQA certificate prior to appointment. Detailed work history which includes the organisation, role, tenor (indicating the dates of commencement and departure), responsibilities and sector should be provided to support the number of years of professional experience.

6. TENDERING REQUIREMENTS

The evaluation of bidders' submissions will be conducted in accordance with the Treasury prescripts, DBSA policies and bid conditions, and will encompass the following five key evaluation phases:

- a) **Step 1: Eligibility Criteria** – to determine compliance with the mandatory administrative and statutory requirements;
- b) **Step 2: Functionality Criteria** – to assess the bidder's technical capability and capacity to deliver the required services;
- c) **Step 3: Price** – assess the reasonableness of the price offered, seek clarification and negotiation where possible and .
- d) **Step 4: Preference** – to evaluate the final financial proposal in line with the 80/20 preference-point systems. Where 80/90 represents price and 20/10, BBBEE points.

A. STEP 1: ELIGIBILITY CRITERIA

- All Bidders shall attend a compulsory Tender Briefing and complete an attendance register to record their attendance. Only Bidders whose attendance was recorded at the time of the compulsory Tender Briefing will be considered and evaluated when the tender closes and tender submissions are received.
- Bidders are expected to return the bid documents in the manner described in these Terms of Reference.
- Bidders must submit their pricing proposals in A SEPARATE FOLDER clearly marked "pricing proposal". The proposal should not be combined with any of the other submissions, including the resource matrix, CVs, project reference list, methodology and approach proposal because these qualitative and other criteria are sought to be assessed independently of the pricing proposal.
- A bidder that meets all the above requirements will then be assessed on the functionality criteria.

B. STEP 2: FUNCTIONALITY CRITERIA

- Only bidders who meet and pass all eligibility requirements above (Step 1) will proceed to this phase: the functionality evaluation stage. At this stage, bidders will be assessed on the following aspects: demonstrated qualifications; years of relevant experience; evidence of projects completed using the CBA/CEA methodology; proposed methodology and execution plan; and the bidder's capacity-building and skills-transfer approach.
- To pass the Functionality criteria, a bidder must obtain a minimum score of **80 points out of a total of 100 points**. Bidders who fail to meet the minimum threshold will be deemed non-responsive and will not be considered further.
- **Table 2** outlines the evaluation elements that will be used to assess whether a bidder possesses the requisite experience, capacity, and technical capability. Scoring will be based solely on the verifiable supporting documentation submitted.
- For Sub-criteria 1 and 2, bidders are encouraged to utilise the Curriculum Vitae (CV) standard template provided in **Appendix A** as a guideline to ensure that all required information is submitted in a clear and consistent format.
- Bidders are advised to submit more than the minimum required number of projects (*for sub criteria 3 below*) to safeguard against delisting of project due to incompleteness.

- Only bidders who meet or exceed the prescribed functionality threshold will have their financial proposals opened and subjected to a comprehensive price and preference evaluation (Step 3 & 4).

Table 2: Functionality Criteria –

No.	Evaluation Criteria	Scoring for whole element	Weight	Score
1	Lead Cost Benefit Analysis/Cost Effectiveness Analysis Expert		40 out of 100	
1.1	A Cost Benefit Analysis/Cost Effectiveness Analysis (CBA/CEA) Lead Expert with a postgraduate degree in Development Finance or Economics or Econometrics or Statistics or related field.	Master's Degree or above (NQF 9+): 5 points Honours Degree (NQF 8): 3 points Less than Honours Degree (NQF 8): 0 point	5	
1.2	Extensive experience in CBA/CEA in water and sanitation or transportation or human settlements or telecommunications or energy or agriculture and agro-processing or health or education infrastructure projects.	20+ years: 15 points 15-20 years: 10 points 11-14 years: 5 points 8-10 years: 3 points Anything below 8 years is 0	15	
1.3	Projects undertaken by the Lead Expert using CBA/CEA methodology (current and/or past) in sectors specified in 1.2 above. Only infrastructure projects with a value of R1 billion or more and have successfully secured funding from the BFI or from Multilateral Development Banks will be considered.	7+ projects: 20 points 6-7 Projects: 15 points 4-5 Projects: 10 points 2-3 Projects: 5 Points 1 project: 3 points	20	
2	Cost Benefit Analysis/Cost Effectiveness Analysis Specialist		30 out of 100	
2.1	A Cost Benefit Analysis/Cost Effectiveness Analysis (CBA/CEA) Specialist with a degree in Development Finance or Economics or Econometrics or Statistics or related field.	Master's Degree or above (NQF 9+): 5 points Honours Degree (NQF 8): 3 points Less than Honours Degree (NQF 8): 0 point	5	
2.2	Experience in CBA/CEA in water and sanitation or transportation or human settlements or telecommunications or energy or agriculture and agro-processing or health or education infrastructure projects.	10+ years: 10 points 8-9 years: 8 points 6-7 years: 5 points 4-5 years: 3 points Anything below 4 years is 0	10	
2.3	Projects undertaken by the Specialist using CBA/CEA methodology (current and/or past) in sectors specified in 2.2 above. Only infrastructure projects with a project value of R1 billion or more and have successfully secured funding from the BFI or from Multilateral Development Banks will be considered.	4+ projects: 15 points 3 Projects: 10 points 1-2 Projects: 5 points Anything below 1 project: 0 points	15	

No.	Evaluation Criteria	Scoring for whole element	Weight	Score
3.	Socio-Economic Impact Assessment Specialist (SEIA)		20 out of 100	
3.1	A Socio-Economic Impact Assessment Specialist (SEIA) with a degree in Development Finance or Economics or Econometrics or Statistics or related field.	Master's Degree or above (NQF 9+): 5 points Honours Degree (NQF 8): 3 points Less than Honours Degree (NQF 8): 0 point	5	
3.2	Experience in SEIA in water and sanitation or transportation or human settlements or telecommunications or energy or agriculture and agro-processing or health or education infrastructure projects.	10+ years: 5 points 8-9 years: 3 points 4-7 years: 1 point Anything below 4 years is 0	5	
3.3	Projects undertaken by the Specialist using SEIA methodology (current and/or past) in sectors specified in 3.2 above. Only infrastructure projects with a project value of R1 billion or more and have successfully secured funding from the BFI or from Multilateral Development Banks will be considered.	4+ projects: 10 points 3 Projects: 8 points 1-2 Projects: 5 points Anything below 1 project: 0 points	10	
	Project implementation Methodology and Skills Transfer and Capacity Plan		10 out of 100	
4.	Comprehensive and credible project methodology and project plan to execute the assignment within the specifications and timelines.	Excellent: Detailed and robust methodology = 5 points Good: Semi – detailed methodology and plan = 3 points Poor and unclear methodology and plan = 0 point	5	
5.	A plan for skills development, transfer and capacity value added to IFISA and Project Sponsors.	Excellent: Detailed and comprehensive, methodical and time-based skills transfer plan = 5 points Good: Semi detailed and less comprehensive, methodical and time-based skills transfer plan = 3 points Inadequate, untimed skills transfer plan = 0 points	5	
TOTAL			100	
MINIMUM THRESHOLD			80	

NB: NO INDIVIDUAL CAN BE EVALUTED FOR MORE THAN 1 ROLE, IT IS A REQUIREMENT TO HAVE A RESOURCE FOR EACH OF THE ROLES PROPOSED.

ONLY BIDS WHICH SATISFY ALL THE ABOVE ELIGIBILITY AND FUNCTIONALITY CRITERIA (STEP 1 & 2) WILL BE EVALUATED ON PRICING

IT IS RECOMMEND TO LIST MORE THAN THE MINIMUM REQUIRED NUMBER OF PROJECTS TO SAFEGUARD AGAINST DELISTING OF PROJECT DUE TO INCOMPLETENESS.

Subcontracting

Over and above the conditions stipulated in the Special Conditions (Part E below), the bidder may subcontract part of the works and/or services as stipulated to the extent and with such subcontractor(s) as may be approved in advance by the IFISA, subject to the following conditions:

- it is the responsibility of the bidder to select competent subcontractors that possess the expertise stipulated in these Terms of Reference;
- the bidder shall be responsible for all due diligence of the selected subcontractors and will be held liable for any non-performance of the subcontractor;
- no separate contract shall be entered into between the IFISA and any such subcontractors. Copies of the signed agreements between the relevant parties must be attached to the proposal responses; and
- the bidder is required to provide documentation (such as BBBEE Certificate/Sworn Affidavit, Valid or Active Tax Compliance Status Pin Issued by SARS, CSD Summary Report, Valid or Active CIDB Certificate etc.) for the relevant subcontractor as a minimum in support of the subcontracting arrangement (in the case of subcontracting of natural person(s) this requirement shall not apply).

Notwithstanding the above, the Bidder shall retain full responsibility for providing the services to the IFISA. The bidder shall not subcontract the whole of the services.

C. STEP 3: PRICE PROPOSAL

Only bidders who meet and pass Step(s) 1 and 2 above will proceed to this phase: the Price Proposal. Bidders will then have their financial proposals opened and subjected to a comprehensive price review and scrutiny.

Price proposals will be scrutinized to verify the absence of arithmetical errors, omissions, and inconsistencies. Bidders will be notified of all errors or omissions that are identified in the tender offer and either confirm the bid offer as tendered or accept the corrected total of prices.

The pricing offer will be binding upon acceptance by the DBSA.

Nonetheless, the DBSA reserves the right to negotiate the pricing offer with the preferred bidder.

Bidders are kindly cautioned that the pricing proposal should be submitted in A SEPARATE FOLDER clearly marked "pricing proposal".

The proposal should not be combined with any of the other submissions, including the resource matrix, CVs, project reference list, methodology and approach proposal because these qualitative and other criteria are sought to be assessed independently of the pricing proposal

BIDDERS WHO FAIL TO SUBMIT THEIR PRICING PROPOSAL IN A SEPARATE FOLDER MAY FACE DISQUALIFICATION FROM THE PROCESS

This assignment will be a fixed-price contract, notwithstanding that cost components may be based on hourly rates.

Accordingly, the bidder is required to propose pricing on a lump sum basis, broken down by stages, using Table 3 below. The pricing per stage may be split per deliverable in that stage. The pricing offer should be all-inclusive.

IFISA requires the appointed service provider to undertake approximately fifty (50) cost-benefit/cost-effectiveness analyses (CBA/CEA) and socio-economic impact assessments (SEIA) over a five (5) year period.

The pricing, for evaluation and comparative purposes, shall represent the total cost for an estimated fifty (50) projects/studies over the contract duration.

Bidders must submit a single consolidated price for all fifty (50) projects / studies, in accordance with **Appendix B (attached)**.

In addition, bidders shall provide a detailed cost breakdown supporting the total price, clearly indicating the basis of all rates, discounts offered, and underlying assumptions, as guided by **Appendix C (attached)**.

Projects / studies may be implemented in staggered groups of ten (10) (i.e., 1–10, 11–20, 21–30, 31–40, and 41–50).

The pricing breakdown must reflect these groupings, with any applicable discounts or incentives clearly specified.

Bidders should note that the final 20–25 projects are likely to be implemented between Years 2 and 5. Accordingly, bidders must account for discounts and inflation in their pricing, as no price escalation will be permitted during implementation. All rates agreed with DBSA/IFISA shall be fixed and final.

The following remuneration schedule is set for each part of the contract. Bidders should adhere to these in their proposals, within the total budget given.

Table 3: Pricing of the scope of work per project must be apportioned as follows:

Deliverable	Percentage (Each deliverable should not exceed the indicated below)
Draft Socio-Economic Impact Assessment Report	12.5%
Final Socio-Economic Impact Assessment Report	12.5%
Draft Economic Model	15%
Final Economic Model	15%
Draft CBA/CEA Report	20%
Final CBA/CEA Report	20%
Capacity Building and Skills Transfer	5%

Deliverables completed per the remuneration schedule will be approved by the project team/project steering committee, after which invoices may be submitted for payment as per the remuneration schedule. IFISA will pay within 30 days of receiving the approved invoice.

It is envisaged that the scope of work to be covered is mostly desktop, however, should the bidder be required to travel, the consultants will be able to claim reimbursable expenses on the project for costs such as airline tickets (at economy fare rates) and hotel accommodations (within an approved list of hotels) to the extent that the travels have been approved in advance with the IFISA.

All other expenses, included but not limited to telecom costs, taxi, printing and photocopies, meals etc. will not be subject to reimbursement.

D. STEP 4: PREFERENCE

Bidders whose prices have been clarified, negotiated, or accepted in accordance with Step 3 above will be evaluated on either the 80/20 or 90/10 preference point system. Once bidder(s) are received, the lowest acceptable bidder will be used to determine the preference point system to be used for the evaluation of tenders. Where the lowest acceptable tender is below R50 million, the 80/20 preference point system will be used. If the lowest acceptable bidder is above R50 million, the 90/10 preference point system will be used. 80 or 90 points are allocated for Price, and 20 and/or 10 points for B-BBEE status.

To qualify for preference points, bidders must submit a valid B-BBEE Certificate issued in accordance with the relevant Sector Codes by a Verification Agency accredited by the South African National Accreditation System (SANAS). The certificate must clearly display the SANAS logo and the required accreditation description. Failure to submit a valid certificate will result in the bidder scoring zero (0) preference points.

In the case of a Joint Venture (JV), a consolidated and valid B-BBEE Certificate prepared specifically for the JV must be submitted. Alternatively, Exempted Micro Enterprises (EMEs) and Qualifying Small Enterprises (QSEs) with at least 51% Black ownership may submit a sworn affidavit confirming annual turnover and level of Black ownership, in line with the applicable legislative requirements.

E. SPECIAL CONDITIONS

It is a requirement of this project that the successful bidder subcontract a minimum of **thirty percent (30%)** of the total value of the work and/or services to an Exempted Micro Enterprise (EME) or Qualifying Small Enterprise (QSE) entities that is at least 51% owned by persons domiciled in the Republic of South Africa, by the start of the contract.

The tenderer must submit, as part of its bid, a detailed proposal outlining the manner in which the subcontracting requirement will be fulfilled. This proposal must clearly specify which portions of the work or services will be subcontracted and the entities to which such work will be allocated.

No formal contract will be signed with any bidder that fails to meet these requirements. A preferred bidder who has not fully complied with this condition, or who has failed to adequately indicate how the requirement will be met, will be granted a period of up to seven (7) days to satisfy this requirement prior to the conclusion of any contract with DBSA/IFISA. Any bidder that fails to comply with this requirement, including after being afforded the prescribed time and opportunity to do so, will be disqualified from the bidding process.

As part of fulfilling the bidding requirements, and specifically in respect of the mandatory subcontracting requirement, bidders must submit, together with their proposal, the following information relating to each proposed subcontractor:

- A valid B-BBEE certificate issued by a SANAS-accredited B-BBEE verification agency, or a sworn affidavit confirming B-BBEE status level (ownership % level and EME / QSE status); alternatively, an auditor's certificate or similar certification issued by an accounting officer or verification agency confirming the entity's qualification as an EME or QSE;
- CIPC registration documents;
- Certified copies of the identity documents of the subcontractor(s);
- Proof of business address in the Republic of South Africa, which may include:
 - A copy of the title deed in the name of the enterprise; or
 - A sworn affidavit confirming the business address; or
 - Any other documentation acceptable to DBSA, provided that such documentation demonstrates established and ongoing business operations in South Africa and is objectively verifiable.

Other acceptable supporting documentation may include:

- A lease agreement concluded at least six (6) months prior to the date of publication of the invitation to bid, evidencing established business operations in South Africa; or
- A municipal rates and/or utilities invoice issued within two (2) months prior to the bid submission date, reflecting the name and address of the bidder or, where applicable, a member of an unincorporated joint venture or consortium; or
- A lease agreement that commenced within six (6) months prior to the bid submission date.

F. STEP 5: OBJECTIVE CRITERIA AND RISK ANALYSIS

Bidders whose price and preference points have been calculated and ranked will be subjected to further due diligence to confirm full compliance with all bid requirements and conditions. The due-diligence process will consist of the following actions:

- The decision to award will be based on the above stipulated strategy, best commercial offer.
- In addition to the financial offer and preference evaluation, the Bidders having the highest ranking / number of points, will additionally be reviewed against the following points, in order to ascertain suitability for award – we reserve the right to clarify any aspects listed hereunder where applicable:
 - if having passed Responsiveness, the Bidder will again be checked in terms of having a Compliant Tax Status at time of recommendation to confirm that the status has not

changed, based on an active and Tax Complaint Pin issued by the South African Revenue Services;

- fully compliant and registered with the National Treasury Central Supplier Database;
 - no misrepresentation in the tender information submitted;
 - the Bidder or any of its directors/shareholders is not listed on the Register of Tender Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business with the public sector;
 - the Bidder has completed the Compulsory Enterprise Questionnaire and there are no conflicts of interest which may impact on the Bidder's ability to perform the contract in the best interests of the employer or potentially compromise the tender process;
 - not convicted by a court of law for fraud and corruption; and
 - not removed from a contract between them and any organ of state on account of failure to perform on or comply with the contract.
- The decision to award will be based on best commercial offer and value for money principle for the DBSA.
 - Where the next highest ranked bidder is being considered for an offer of award), the DBSA reserves the right to negotiate with the next highest ranked bidder in hierarchical order, to ensure the value for money principle is not compromised.
 - In cases where negotiations are unsuccessful, the DBSA may revert back to a higher ranked bidder.

7. RULES OF BIDDING, OBJECTIVITY CRITERIA, AND CONDITION OF AWARDS

8.1 Rules of bidding

- i. The IFISA will enter into a contract with the advisor for the work set out in these Terms of Reference. The advisor must be a single legal entity, which must obtain expertise through sub-contracts if necessary. Any proposal submitted by a consortium or joint venture of two or more firms must be accompanied by the consortium formation document or joint venture agreement, as applicable, authenticated by a Notary Public, which sets forth the precise responsibilities of each of the parties thereto. Consortia and joint venture members should be advised that each member would be held jointly and severally liable for the performance of the consortium or joint venture.
- ii. The IFISA reserves the right to terminate this appointment or temporarily defer the work, or any part thereof. If the contract between IFISA and the advisor is terminated by either party due to reasons not attributable to the advisor, the advisor will be remunerated for the appropriate portion of work completed up to a maximum amount of not more than the total fee bid by the advisor for the appropriate phase of the project during which the appointment was terminated.
- iii. The persons proposed for professional work on the project shall remain on the project unless permission is granted in writing by the IFISA to change the resource. Such permission will only be granted in exceptional circumstances.
- iv. **The advisor may not use any material or information derived from the provision of the services in terms of the contract for any purpose. Copyright of all documents and electronic aids, software programmes prepared or developed in terms of this appointment shall vest in the IFISA and DBSA.**
- v. The costs of preparing proposals and of negotiating the contract are not reimbursable.
- vi. The advisor and its affiliates are disqualified from providing goods, works and services to any bidding consortium or members of such a consortium and/or the private party to the agreement, or to any eventual project that may result, directly or indirectly from these services.
- vii. The IFISA will not accept any late bid submissions and will return late bid submissions unopened. Bidders may not contact IFISA or any participant on any matter pertaining to their bid from the time when bids are submitted to the time the contract is awarded. Any efforts by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any manner, will result in rejection of the bid.

CONDITIONS OF AWARD

The following award conditions are applicable:

- The successful bidder will be required to enter into a services agreement with the IFISA on such terms as will be specified at the contracting stage, which will include the IFISA's standard terms for similar agreements.
- A preferred bidder who has not fully complied with the mandatory 30% sub contracting condition, or who has failed to adequately indicate how the requirement will be met, will be granted a period of up to seven (7) days to satisfy this requirement prior to the conclusion of any contract with DBSA/IFISA.

- The consultants will report to the Head: Strategic Partnerships and Origination (at IFISA) and may, from time to time, be required to present and submit progress reports within stipulated timeframes. The consultants will be expected to confirm professional indemnity cover for the active duration of the assignment.
- The services agreement will provide for the process to be followed for the approval and payment of invoices, and the approval or adoption of deliverables, which will be based on the IFISA's management of payment and approval processes for similar services.
- The professionals allocated by the consultant team to the assignment shall remain on the assignment unless permission is granted in writing by IFISA to change dedicated professionals. Such permission will only be granted in exceptional circumstances.
- Intellectual property developed as a consequence of the consultant's work on the assignment will vest in the IFISA.
- The services agreement will provide for the protection of confidential information, which will be based on the IF's standard terms and conditions for similar agreements.
- The costs of preparing proposals and negotiating the contract are not reimbursable;
- The IFISA is not obligated to accept any of the proposals submitted and reserves the right to negotiate the price with the preferred bidder;
- The Transaction Advisor shall be precluded from undertaking any work or providing any services to any bidding consortium or members of such a consortium and/or the private party or to any eventual project that may result, directly or indirectly from these Services;
- The DBSA will not accept any late bid submissions. Bidders may not contact the DBSA or IFISA or any participant on any matter pertaining to their bid from the time when bids are submitted to the time the contract is awarded. Any efforts by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any manner, will result in rejection of the bid.
- It is the responsibility of the bidder to ensure that soft copies of documents are provided in formats that are supported by Adobe Acrobat®. All bids, or parts thereof, which cannot be opened will not be evaluated.
- The DBSA reserves the right to change any information in, or to issue an addendum to this document 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. Should the DBSA exercise its right to change information, it may seek amended responses from all bidders.

THE DBSA CAN CANCEL OR AMEND OR PARTIALLY AWARD THE CONTRACT ACCORDING TO ITS REQUIREMENTS.

Fees and Assumptions

FORM OF OFFER AND ACCEPTANCE (AGREEMENT)

FORM OF OFFER

THE CONSULTANT IS TO COMPLETE AND SIGN THE FORM OF OFFER

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

RFP079/2026 PROCUREMENT OF COST BENEFIT/COST EFFECTIVENESS AND SOCIO-ECONOMIC IMPACT ASSESSMENT SPECIALISTS FOR THE BUDGET FACILITY FOR INFRASTRUCTURE SUBMISSIONS FOR PROJECT SPONSORS PARTNERING WITH THE INFRASTRUCTURE FINANCE AND IMPLEMENTATION SUPPORT AGENCY

The Tenderer, identified in the Offer signature block below, has examined the documents listed in the Tender Data and addenda thereto as listed in the Tender Schedules, and by submitting this Offer has accepted the Conditions of Tender.

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

THE OFFERED TOTAL OF THE PRICES INCLUSIVE OF ALL TAXES IS

.....
..... (in words); ZAR (in figures),
.....

This offer may be accepted by the Employer by signing the Acceptance part of this Form of Offer and Acceptance and returning one copy of this document to the Tenderer before the end of the

period of validity stated in the Tender Data, whereupon the Tenderer becomes the party named as the consultant in the Conditions of Contract identified in the Contract Data.

Signature(s)

Name(s)

Capacity

**For the
Tenderer**

(Name and address of organisation)

**Name and
signature of
witness**

Date

Annexure A

Price proposal

(Note: This page must be separated from the pre-qualifying and functional proposal. Failure to separate this, will lead to disqualification of the bid)

Only bidders who meet and pass Step(s) 1 and 2 above will proceed to this phase: the Price Proposal. Bidders will then have their financial proposals opened and subjected to a comprehensive price review and scrutiny.

Price proposals will be scrutinized to verify the absence of arithmetical errors, omissions, and inconsistencies. Bidders will be notified of all errors or omissions that are identified in the tender offer and either confirm the bid offer as tendered or accept the corrected total of prices.

The pricing offer will be binding upon acceptance by the DBSA.

Nonetheless, the DBSA reserves the right to negotiate the pricing offer with the preferred bidder.

Bidders are kindly cautioned that the pricing proposal should be submitted in A SEPARATE FOLDER clearly marked "pricing proposal".

The proposal should not be combined with any of the other submissions, including the resource matrix, CVs, project reference list, methodology and approach proposal because these qualitative and other criteria are sought to be assessed independently of the pricing proposal

BIDDERS WHO FAIL TO SUBMIT THEIR PRICING PROPOSAL IN A SEPARATE FOLDER MAY FACE DISQUALIFICATION FROM THE PROCESS

This assignment will be a fixed-price contract, notwithstanding that cost components may be based on hourly rates.

Accordingly, the bidder is required to propose pricing on a lump sum basis, broken down by stages, using Table 3 below. The pricing per stage may be split per deliverable in that stage. The pricing offer should be all-inclusive.

IFISA requires the appointed service provider to undertake approximately fifty (50) cost-benefit/cost-effectiveness analyses (CBA/CEA) and socio-economic impact assessments (SEIA) over a five (5) year period.

The pricing, for evaluation and comparative purposes, shall represent the total cost for an estimated fifty (50) projects/studies over the contract duration.

Bidders must submit a single consolidated price for all fifty (50) projects / studies, in accordance with **Appendix B (attached)**.

In addition, bidders shall provide a detailed cost breakdown supporting the total price, clearly indicating the basis of all rates, discounts offered, and underlying assumptions, as guided by **Appendix C (attached)**.

Projects / studies may be implemented in staggered groups of ten (10) (i.e., 1–10, 11–20, 21–30, 31–40, and 41–50).

The pricing breakdown must reflect these groupings, with any applicable discounts or incentives clearly specified.

Bidders should note that the final 20–25 projects are likely to be implemented between Years 2 and 5. Accordingly, bidders must account for discounts and inflation in their pricing, as no price escalation will be permitted during implementation. All rates agreed with DBSA/IFISA shall be fixed and final.

The following remuneration schedule is set for each part of the contract. Bidders should adhere to these in their proposals, within the total budget given.

Table 3: Pricing of the scope of work per project must be apportioned as follows:

Deliverable	Percentage (Each deliverable should not exceed the % indicated below)
Draft Socio-Economic Impact Assessment Report	12.5%
Final Socio-Economic Impact Assessment Report	12.5%
Draft Economic Model	15%
Final Economic Model	15%
Draft CBA/CEA Report	20%
Final CBA/CEA Report	20%
Capacity Building and Skills Transfer	5%

Deliverables completed per the remuneration schedule will be approved by the project team/project steering committee, after which invoices may be submitted for payment as per the remuneration schedule. IFISA will pay within 30 days of receiving the approved invoice.

It is envisaged that the scope of work to be covered is mostly desktop, however, should the bidder be required to travel, the consultants will be able to claim reimbursable expenses on the project for costs such as airline tickets (at economy fare rates) and hotel accommodations (within an approved list of hotels) to the extent that the travels have been approved in advance with the IFISA.

All other expenses, included but not limited to telecom costs, taxi, printing and photocopies, meals etc. will not be subject to reimbursement.

APPENDIX A: STANDARD CV TEMPLATE

CV Template		
Proposed resource Information		
Proposed Position as per the TOR		
Name of the Firm		
Date of Employment		
Name of the staff member		
Date of birth		
Nationality		
Education		
Date Obtained	Institution	Degrees Obtained and National Qualification Level

Experience				
Employment History Date i.e. (Jan 2000 – Dec 2015)	Position Held	Company Name	Detail description in line with the criteria	Sector Experience

Project list template for the CBA/CEA/SEIA specialists

Key Projects Undertaken 1	
Name of the Assignment/Project	
Period	
Location	
Client	
Sector	
Main Economic Features of the Project	

Positions Held	
Project Value in ZAR	
Has the project successfully secured funding from the BFI (Yes / No) Please elaborate	
Has the project successfully secured funding from the Multilateral Development Banks (Yes / No) Please elaborate	
Year Submitted to the BFI/ Multilateral Development Banks	
Activities Performed	
Key Projects Undertaken 2	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project successfully secured funding from the BFI (Yes / No) Please elaborate	
Has the project successfully secured funding from the Multilateral Development Banks (Yes / No) Please elaborate	
Year Submitted to the BFI// Multilateral Development Banks	
Activities Performed	
Key Projects Undertaken 3	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	

Main Project features	
Positions Held	
Project Value in ZAR	
Has the project successfully secured funding from the BFI (Yes / No) Please elaborate	
Has the project successfully secured funding from the Multilateral Development Banks (Yes / No) Please elaborate	
Year Submitted to the BFI// Multilateral Development Banks	
Activities Performed	
Key Projects Undertaken 4	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project successfully secured funding from the BFI (Yes / No) Please elaborate.	
Has the project successfully secured funding from the Multilateral Development Banks (Yes / No) Please elaborate	
Year Submitted to the BFI// Multilateral Development Banks	
Activities Performed	
Key Projects Undertaken 5	
Name of the Assignment / Project	
Period	
Location	

Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project successfully secured funding from the BFI (Yes / No) Please elaborate	
Has the project successfully secured funding from the Multilateral Development Banks (Yes / No) Please elaborate	
Year Submitted to the BFI// Multilateral Development Banks	
Activities Performed	

Enclosure: Copies of certificates of academic qualifications and, if applicable, Certificate of Professional registration (Copies of qualifications along with detailed CV of personnel. All international qualifications will need to be verified through a SAQA certificate prior to appointment. **The bidder is required to replicate this template in full to ensure that all requested information is comprehensively and accurately provided.**

APPENDIX B**CONSOLIDATED PRICES FOR FIFTY (50) STUDIES / PROJECTS**

Item	Deliverable	Percentage (apportionment) Each deliverable should not exceed the % indicated below)	Total (excluding VAT %) (Average prices per deliverable in Appendix C)
1	Draft Socio-Economic Impact Assessment Report	12.5%	
2	Final Socio-Economic Impact Assessment Report	12.5%	
3	Draft Economic Model	15%	
4	Final Economic Model	15%	
5	Draft CBA/CEA Report	20%	
6	Final CBA/CEA Report	20%	
7	Capacity Building and Skills Transfer	5%	
		Sub Total (Excluding VAT)	
		Add VAT (15%)	
		Grand Total	

NB: This template above is for guidance to bidders. Bidders are required to replicate this template in full to ensure that all requested information is comprehensively and accurately provided.

APPENDIX C

PRICES PER PROJECTS (STAGGERED IN GROUP OF TENS (10))

Item	Deliverable	Percentage (apportionment) Each deliverable should not exceed the % indicated below)	Projects / Studies	Projects / Studies	Projects / Studies	Projects / Studies	Projects / Studies
			1-10	11-20	21-30	31-40	41-50
			Prices, including Discounts and excluding VAT 15%)	Prices, including Discounts and excluding VAT 15%)	Prices, including Discounts and excluding VAT 15%)	Prices, including Discounts and excluding VAT 15%)	Prices, including Discounts and excluding VAT 15%)
1	Draft Socio-Economic Impact Assessment Report	12.5%					
2	Final Socio-Economic Impact Assessment Report	12.5%					
3	Draft Economic Model	15%					
4	Final Economic Model	15%					
5	Draft CBA/CEA Report	20%					
6	Final CBA/CEA Report	20%					

7	Capacity Building and Skills Transfer	5%					
	Sub Total (per group of projects (Excluding VAT))						
	Add VAT (15%)						
	Totals (Per group of projects (Including VAT))						

NB: This template above is for guidance to bidders. Bidders are required to replicate this template in full to ensure that all requested information is comprehensively and accurately provided.

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 interest² 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

² 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.

2.2 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 consortium³ 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

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.

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 or 90/10** preference point system.

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 either:

	POINTS	POINTS
PRICE	80	90
SPECIFIC GOALS (BBBEE)	20	10
Total points for Price and SPECIFIC GOALS	100	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 OR 90/10 PREFERENCE POINT SYSTEMS

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

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right) \quad \text{or} \quad Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = 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 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \text{ or } Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

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 or 90/10 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 or 90/10 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 or 90/10 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 both the 90/10 and 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 the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	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)
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>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p>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.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

Annexure F

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

Annexure G

Certified copies of latest share certificates, in case of a company.

Annexure H

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

Annexure I

Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria.

Annexure J

[General Conditions of Contract]

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

PLEASE NOTE FURTHER THAT ALL BIDDERS MUST ENSURE THAT THEY ARE WELL 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?		

Annexure K

Tax Compliant Status and CSD Registration Requirements

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

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

CSD Registration Number:



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

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