

REQUEST FOR PROPOSALS



|   |  |
|---|--|
| <b>YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED</b> |  |
| <b>BID NUMBER:</b>  | <b>RFP087/2026</b>   |
| <b>COMPULSORY BRIEFING SESSION DETAILS:</b>   | <a href="#"><u>Compulsory Briefing Registration Link 22 May 2026</u></a>   |
| <b>CLOSING DATE:</b>  | <b>05 June 2026</b>  |
| <b>CLOSING TIME:</b>  | 23H55 (Midnight)   |
| <b>PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:</b>  | 120 days   |
| <b>DESCRIPTION OF BID:</b>  | <b>PROCUREMENT OF A BUSINESS PROCESS MODELLING AND ANALYSIS SOLUTION</b>   |
| <b>BID DOCUMENTS ELECTRONIC SUBMISSION:</b>   | <p><b>ELECTRONIC SUBMISSIONS</b></p> <p><b><u>INSTRUCTIONS:</u></b></p> <ul style="list-style-type: none"> <li>➤ Bidders are required to submit written requests for clarification via e-mail to <a href="mailto:davidscm@dbsa.org"><u>davidscm@dbsa.org</u></a> <b>ONLY</b>, quoting the RFP Number on the subject of the e-mail. This must be done three (3) working days before closing day of the bid including request for submission link.</li> <li>➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically.</li> <li>➤ Written requests for clarification will be considered up to and including <b>02 JUNE 2026 16:30</b> Johannesburg time. Requests received after this date may not be attended to.</li> <li>➤ Any requests after the stipulated date and time may be disregarded.</li> </ul> <p><b>NB: Electronic submission is encouraged for all bidders interested in this tender.</b></p> <p><b>Closing date of this RFP087/2026 is 05 JUNE 2026 before 23:55PM.</b></p> <p><b>No physical bids will be received or accepted at the DBSA offices</b></p> |
| <b>NAME OF BIDDER:</b>  |  |
| <b>CONTACT PERSON:</b>  |  |
| <b>EMAIL ADDRESS:</b>   |  |
| <b>TELEPHONE NUMBER:</b>  |  |
| <b>FAX NUMBER:</b>  |  |
| <b>BIDDER'S STAMP OR SIGNATURE</b>  |  |



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

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

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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: RFP087/2026**

**DESCRIPTION: PROCUREMENT OF A BUSINESS PROCESS MODELLING AND ANALYSIS SOLUTION**

**COMPULSORY BRIEFING: 22 May 2026**

**COMPULSORY BRIEFING LINK [Compulsory Briefing Registration Link 22 May 2026](#)**


Time: 10H00 AM Johannesburg time (**Microsoft Teams**)

Closing time for the OneDrive Link submissions - **23h55 on the 05 JUNE 2026**


CLOSING DATE: 05 JUNE 2026


CLOSING TIME: 23H55PM

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.

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

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

**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)?  
 YES  NO
- 3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?  
 YES  NO
- 3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  
 YES  NO
- 3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?  
 YES  NO

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

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

**PART C**

**CHECKLIST OF COMPULSORY RETURNABLE SCHEDULES AND DOCUMENTS**

**Please adhere to the following instructions:**

- Tick in the relevant block below;
- Ensure that the following documents are completed and signed where applicable; and
- Use the prescribed sequence in attaching the 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

| <b>YES</b>               | <b>NO</b>                |  |
|--------------------------|--------------------------|--|
| <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 – <b>Electronic submission</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Part A:</b> Invitation to Bid   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Part B:</b> Terms and Conditions of Bidding   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Part C:</b> Checklist of Compulsory Returnable Schedules and Documents  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Part D:</b> Conditions of Tendering and Undertakings by Bidders   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Part E:</b> Specifications/Terms of Reference and Project Brief   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure A:</b> Price Proposal Requirement  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure B:</b> SBD4 Declaration of Interest  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure C:</b> SBD6.1 and B-BBEE status level certificate  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure F:</b> Certified copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure G:</b> Certified copies of latest share certificates, in case of a company.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure H: (if applicable):</b> A breakdown of how fees and work will be spread between members of the bidding consortium.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure I:</b> Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria.  |

**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** for the OneDrive Link submissions - 23h55 on the 31 January 2025 (Telkom Time)
- 1.10 **DBSA** means the Development Bank of Southern Africa Limited.
- 1.11 **DFI** means Development Finance Institution.
- 1.12 **Evaluation Criteria** means the criteria set out under the clause 26 (Evaluation Process) of this Part C, which includes the Qualifying Criteria, Functional Criteria and Price and Preferential Points Assessment (where applicable).
- 1.13 **Functional Criteria** means the criteria set out in clause 27 of this Part C.
- 1.14 **Intellectual Property Rights** includes copyright and neighbouring rights, and all proprietary rights in relation to inventions (including patents) registered and unregistered trademarks (including service marks), registered designs, confidential information (including trade secrets and know how) and circuit layouts, and all other proprietary rights resulting from intellectual activity in the industrial, scientific, literary or artistic fields.

- 1.15 **PFMA** means the Public Finance Management Act, 1999.
- 1.16 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000.
- 1.17 **PPPFA Regulations** means the Preferential Procurement Regulations, 2022 published in terms of the PPPFA.
- 1.18 **Pre-Qualifying Criteria** means the criteria set out in clause **Error! Reference source not found.** of this Part C.
- 1.19 **Price and Preferential Points Assessment** means the process described in clause **Error! Reference source not found.** of this Part C, as prescribed by the PPPFA.
- 1.20 **Proposed Contract** means the agreement including any other terms and conditions contained in or referred to in this RFP that may be executed between the DBSA and the successful Bidder.
- 1.21 **Request for Proposal** or **RFP** means this document (comprising each of the parts identified under Part A, Part B, Part C and Part D) including all annexures and any other documents so designated by the DBSA.
- 1.22 **SARS** means the South African Revenue Service.
- 1.23 **Services** means the services required by the DBSA, as specified in this RFP Part D.
- 1.24 **SLA** means Service Level Agreement.
- 1.25 **SOE** means State Owned Enterprise, as defined by the Companies' Act.
- 1.26 **Specification** means the conditions of tender set and any specification or description of the DBSA's requirements contained in this RFP.
- 1.27 **State** means the Republic of South Africa.
- 1.28 **Statement of Compliance** means the statement forming part of a Tender indicating the Bidders compliance with the Specification.
- 1.29 **Tendering Process** means the process commenced by the issuing of this Request for Proposals and concluding upon formal announcement by the DBSA of the selection of a successful Bidder(s) or upon the earlier termination of the process.
- 1.30 **Website** means a website administered by DBSA under its name with web address [www.dbsa.org](http://www.dbsa.org)

## 2. INTERPRETATIONS

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

- 2.1 "includes" or "including" means includes or including without limitation; and
- 2.2 "R" or "Rand" is a reference to the lawful currency of the Republic of South Africa.

## 3. TENDER TECHNICAL AND GENERAL QUERIES

Queries pertaining to this tender must be directed to:-

DBSA Supply Chain Management Unit

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

No questions will be answered telephonically.

#### **4. SUBMISSION OF TENDERS**

COMPULSORY BRIEFING: 22 MAY 2026 – Refer to the cover page for the link to register and attend the briefing session meeting.

Time: 10H00 AM Johannesburg time (**Microsoft Teams**)

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

CLOSING DATE: 05 JUNE 2026

CLOSING TIME: 23H55PM

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

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

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

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

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

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

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

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

## **9. REPRESENTATIONS**

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

## **10. CONFIDENTIALITY**

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

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

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

- 11.2 All questions or requests for further information or clarification of this RFP or any other document issued in connection with the Tendering Process must be submitted to the Tender Officer in writing, and most preferably by e-mail to [davidscm@dbsa.org](mailto:davidscm@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](mailto: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 120 (one-hundred and twenty) days from the Closing Time. This period may be extended by written mutual agreement between the DBSA and the Bidder.

## 26. EVALUATION PROCESS

26.1 The Bids will be evaluated and adjudicated as follows:

### 26.1.1 First Stage – Test for administrative Responsiveness

The test for administrative responsiveness will include the following:

#### **Stage 1: Responsiveness**

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

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

| Responsiveness Criteria |  | Prequalifying Criteria | Applicable to this Tender (Y/N) |
|-------------------------|--|------------------------|---------------------------------|
| 1                       | Adherence to submitting Tender as a two-folder tender. Folder 1: Functionality and returnable submission separate from Folder 2: Pricing proposal submission | Pre-Qualifier          | Y                               |
| 2                       | Attendance Register of the Compulsory Briefing Session attended by the Tenderer.   | Pre-Qualifier          | Y                               |

**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 Proof of Registration with National Treasury Central Supplier Database (CSD) Summary Report or A Valid and Active Tax Compliance Status Pin issued by SARS for Tax Compliance Status Verification: N.B - Bidder must be fully registered & tax compliant to do business with the DBSA. | 7 Working days     | 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 criteria**

**Stage gate 1: Functional and technical evaluation**

A minimum score of 70% is required to be considered for third stage of evaluation (price and preference evaluation).

| No | Stage Gate      | Stage Gate Description  |
|----|-----------------|---|
| 1  | Stage Gate 1(a) | Functional evaluations: a minimum score threshold score of 70% or higher out of 100 (56 / 80 points) is required to be considered for presentations.  |
| 2  | Stage Gate 1(b) | Presentations: a minimum score threshold of 70% or higher out of 100 (14 / 20 points) is required to be considered for price and preference.  |
| 3  | Stage Gate 2    | A combined overall minimum score of 70% or higher out of 100 (functional evaluation – 56 points including presentation – 14 points) is required to progress to the Price and Preference evaluation. |

Stage Gates

## Stage Gate 1(a): Functional and Technical Evaluation Criteria

| Section | Evaluation Criteria   | Points Allocation   | Weight |
|---------|---|---|--------|
| 1       | <p><b><u>Company Track Record and Experience</u></b></p> <p>The bidder must provide an indication of its track record of implementing the <b>same</b> solution at other companies and the number of years of experience it acquired while implementing such solutions. The bidder must also provide at <b>least three contactable references</b> in the form of letters where the same support services have been implemented and supported successfully by the bidder in institutions similar in size or larger to the DBSA <b>during the last five years.</b></p> <p>The bidder must provide at least 3 signed relevant and contactable reference letter on the company letterhead where the same solution and services were provided.</p> <p>Information must include;<br/>           (1), the scope or services provided and,<br/>           (2) the value and impact of such work.</p> | <p>No company track record and experience information provided. Irrelevant or no submission of Reference letters = <b>0 Points.</b></p> <p>Bidder company information shows a weak track record and shows minimal experience in implementing the same solution. One (1) relevant reference is submitted. = <b>5 Points.</b></p> <p>Bidder company information shows an acceptable track record and shows the required minimal experience in implementing the same solution. Less than 3 relevant references / older than 5 years relevant references are submitted = <b>10 Points.</b></p> <p>Bidder company information has an exceptional track record and shows the required experience in implementing the same solution. Bidder provides 3 or more relevant and contactable reference letters where the required solution was successfully implemented = <b>15 Points.</b></p> | 15     |
| 2       | <p><b><u>Resource Experience</u></b></p> <p>The bidder must provide details of the resources that will be deployed and assigned to implement the proposed solution based on the scope of work to be completed.</p> <p>Resource profiles must be in the form of a resume for each resource (not more than 4 pages).</p> <ul style="list-style-type: none"> <li>CV's must include full names, summary of skills, summary of competencies and summary of qualifications in line with the scope of work.</li> </ul>   | <p>No resources experience information provided = <b>0 Points.</b></p> <p>Bidder provides very little and relevant resources experience information = <b>3 Points</b></p> <p>Bidder provides inadequate and incomplete resources experience information = <b>7 Points.</b></p> <p>Bidder provides adequate and complete resources experiences information = <b>10 Points.</b></p>   | 10     |

| Section             | Evaluation Criteria   | Points Allocation  | Weight     |
|---------------------|---|--|------------|
| 3                   | <p><b><u>Functional (BPM Solution) Requirements</u></b></p> <p>The bidder must describe, discuss, and detail the solution/proposal to meet and conform to <u>all</u> functional requirements as specified in this Terms of Reference (ToR). Refer to Section 5 of this Terms of Reference for the detailed list of BPM Solution requirements.</p> <p><b>Annexure A has been provided. The bidder is advised to use the template provided on the functional requirements.</b></p>  | <p>Core BPM modelling &amp; repository (BR01–BR06, BR15–BR24) = <b>14 Points</b></p> <p>Process analytics, intelligence &amp; diagnostics (BR07–BR14) = <b>6 Points</b></p> <p>Non-functional requirements (NF01–NF11) = <b>5 Points</b></p> <p>Integration &amp; open standards (IR01–IR08) = <b>4 Points</b></p> <p>Security &amp; compliance (SC01–SC16) = <b>6 Points</b></p>  | 35         |
| 4                   | <p><b><u>Support Services Strategy</u></b></p> <p>Provide a detailed support services and maintenance strategy and plan for the duration of the support period based on this ToR, including the following but not limited to;</p> <ul style="list-style-type: none"> <li>• Incident and Service Management strategy</li> <li>• A detailed support services and maintenance plan, including remote and onsite support, especially after hours.</li> <li>• A detailed plan on how incident and service requests are going to be resolved</li> </ul> | <p>No support services and maintenance strategy and plan provided = <b>0 Points</b>.</p> <p>Bidder support services and maintenance strategy and plan contains minimal and inadequate information and is too generic = <b>5 Points</b>.</p> <p>Bidder support services and maintenance strategy and plan contains minimal and adequate information but addresses requirements partially = <b>10 Points</b>.</p> <p>Bidder support and maintenance strategy and plan contains complete information and addresses all requirements in detail = <b>15 Points</b>.</p>                           | 15         |
| 5                   | <p><b><u>Product Roadmap</u></b></p>  | <p>Product roadmap not provided = <b>0 Points</b>.</p> <p>Bidder provided the roadmap, and it outlines planned system enhancements, features releases, and long-term product evolution but it does not cover Process intelligence which talks to process mining, task mining and process monitoring = <b>3 Points</b>.</p> <p>Bidder provided the roadmap, and it outlines planned system enhancements, features releases, and long-term product evolution. The roadmap covers process intelligence which talks to process mining, task mining and process monitoring = <b>5 Points</b>.</p> | 5          |
| <b>Total Weight</b> |   |  | <b>80</b>  |
| <b>Threshold</b>    |   |  | <b>70%</b> |
| <b>Points</b>       |   |  | <b>56</b>  |

Table 1: Sub-Qualifying Criteria: Stage Gate 1(a)

Stage Gate 1 (a) – Functional evaluations: a minimum score threshold of 70 or higher out of 100 (56 / 80 points) is required to be considered for demonstrations or presentations.

### Stage Gate 1(b) Presentation

| Section             | Evaluation Criteria  | Points Allocation   | Weight     |
|---------------------|--|---|------------|
| 6                   | Provide a presentation based on the following criteria:<br>a. Your Proposed Solution<br>b. Address all scope and functional requirements reflected in this ToR.<br>c. Company experience in implementing the proposed solution.<br>d. References | Presentation does not address functional requirements = <b>0</b> points<br>Presentation addresses functional requirements only partially = <b>10</b> points (max)<br>Presentation addresses all functional requirements completely = <b>20</b> points (max) | <b>20</b>  |
| <b>Total Weight</b> |  |   | <b>20</b>  |
| <b>Threshold</b>    |  |   | <b>70%</b> |
| <b>Points</b>       |  |   | <b>14</b>  |

Table 2: Sub-Qualifying Criteria: Stage Gate 1(b)

#### 26.1.3 Third Stage – price

26.1.3.1 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.

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

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

### 27. Risk Analysis and Objective Criteria

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

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

BUSINESS PROCESS MODELLING AND  
ANALYSIS SOLUTION

# 1. Introduction

The Development Bank of Southern Africa (the “DBSA” or the “Bank”) primarily plays a key role in the planning, preparation, funding, building and maintenance phases of the infrastructure development value chain. All the value chain components incorporate fundamental administrative activities such as documentation, procurement, and reporting. The diagram below illustrates our infrastructure value chain, numerous services, and key target markets per value chain segments

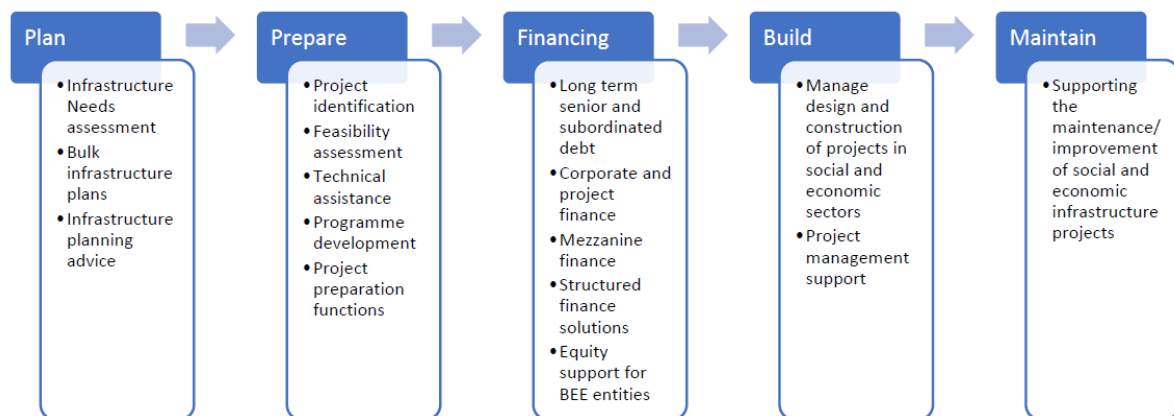


FIGURE 1: DBSA VALUE CHAIN

South Africa has concluded various binational and trade agreements with countries across the continent to support broader regional integration in line with the SADC (Southern African Development Community) Integrated Infrastructure Development Plan, the Programme for Infrastructure Development in Africa (PIDA) and AU (African Union) Africa Agenda 2063. The regional development and integration strategy of the DBSA is aimed at both SADC and the rest of Africa.

## 1. Purpose

The purpose of this document is to detail Terms of Reference for the appointment of a reputable, qualified and certified by the relevant OEM service provider to supply, implement, and support of the business process modelling and analysis solution.

## 2. Background and Objective

Business process mapping is a way to visualise what a business does by considering roles, responsibilities, and standards. Business process modelling (BPM) takes this one step further by providing a visual way to understand, analyse, and improve upon a current method of working.

Business process modelling is more about in-depth analysis and optimising inefficiencies and bottlenecks. It provides consistency, efficiency, and clarity on how business is operating. Business process modelling is essential for accurate and actionable business process analysis. Therefore, business processes need to be modelled to be analysed and for business to make decision on them and on operations.

It is becoming increasingly important for the DBSA to streamline processes by eliminating inefficiencies and bottlenecks. There is also an increasing need to document, model and standardise business processes across divisions, funds, and agencies to improve communication and collaboration across teams, ultimately costs are reduced, productivity increases, and a foundation and environment for compliance and continuous improvement is created.

The DBSA has embarked on a Digital Transformation initiative and as part of the initiative, Business Processes need to be modernised to achieve strategic objectives such as, but not limited to the following:

- Fulfilling and exceeding its client expectations by investing in sustainable growth, inclusivity, and transformation.
- Becoming a catalyst for continental integration and a global investor; and
- Growing our client base and investment products offering through innovative thinking.
- As part of its strategic focus, the DBSA seeks simplify, streamline, and re-imagine internal business processes.

This will be achieved through the review and understanding of its current business processes, ways of work, determination of opportunities for improvement, as well as the creation and implementation of the desired future state.

Business process modelling solutions are essential to create a visual representation of the processes of a business. These tools allow businesses to create process models easily and quickly via a user-friendly and intuitive platform.

The Development Bank of Southern Africa (DBSA) invites proposals from suitably qualified and reputable service providers to supply, implement, and support a Business Process Modelling (BPM) solution. DBSA intends to appoint one (1) a service provider for a minimum of three (3) years to deliver the services described in this Terms of Reference (ToR).

The objective of this engagement is to acquire a robust off-the shelf (pre-built, ready to be used) BPM solution that supports business process modelling, analysis, reporting, and

continuous improvement, together with implementation, enablement, and ongoing support services.

### **3. Scope of Work**

The successful bidder will be required to deliver the following services and outputs:

#### **3.1. Supply and Implementation of the BPM Solution**

The Bidder shall:

- Supply a Business Process Modelling Solution that meets DBSA functional and technical requirements.
- Perform full system implementation, including:
  - Installation and configuration of the BPM Solution;
  - Configuration of required functionalities;
  - Integration with existing DBSA systems, where applicable;

#### **3.2. Testing and Quality Assurance Documentation**

The bidder shall:

- Develop and submit comprehensive test specification documentation aligned with DBSA requirements.
- Ensure that the documentation supports all required testing activities, including system testing, integration testing, and UAT.

#### **3.3. Solution Architecture and Deployment Documentation**

The bidder shall compile and deliver detailed solution architecture and deployment documentation, including but not limited to:

- Logical and Physical Design Documentation, detailing:
  - Business and system use cases;
  - Application functions;
  - Data models; and
  - Technology platforms and infrastructure required to host the solution.
- Detailed Deployment Model, illustrating system components and environments.
- System Configuration Documentation, including configuration parameters and settings.
- Standard Reports and Analytics, available within the BPM Solution.
- Standard Metadata Definitions, including:
  - Field descriptions;

- Data formats; and
- Business and validation rules.

### **3.4. Training and Knowledge Transfer**

The bidder shall:

- Propose and describe, in detail, a structured training and knowledge transfer approach.
- Deliver training to:
  - DBSA Business and Process Analysts and
  - To all affected stakeholders as required.
- Ensure that knowledge transfer enables DBSA to independently operate, manage, and use the BPM Solution effectively.
- Specify structured training and/or certification paths for DBSA staff to ensure sustainability.

### **3.5. System Support and Maintenance**

The successful bidder shall provide system and application support for the BPM Solution for a period of three (3) years and may be extended to 5 years, which shall include:

- Ongoing system maintenance and operational support;
- Resolution of incidents and defects;
- Support for system enhancements and upgrades, where required; and
- Adherence to industry best practices, processes, and methodologies for system support and maintenance.

### **3.6. Product Roadmap**

The bidder shall:

- Provide a detailed product roadmap for the proposed BPM Solution.
- The roadmap must outline planned system enhancements, feature releases, and long-term product evolution over the contract period.
- The bidder must clearly articulate how the proposed BPM solution currently supports, or will support, business process mining, task mining, and process monitoring including details of planned capabilities reflected in the product roadmap.

## 4. BPM Solution Requirements

The Bidder's solution will be evaluated against, in addition to other requirements, their responses on how they will address the requirements as defined in this section.

### 4.1. Business Requirements

| Business Requirements |                                  |   |
|-----------------------|----------------------------------|---|
| Req. No               | Requirement                      | Description   |
| BR01                  | Process Modelling                | The BPM Solution must support the mapping, modelling, design, and documentation of business processes using recognised modelling notations such as BPMN 2.0, enabling the organisation to accurately understand and document end-to-end business processes. |
| BR02                  |                                  | The BPM Solution must enable rapid creation of process models using business notations BPMN 2.0 or ISO/IEC 19510:2013 (OMG standards), with all models and supporting documentation stored within a centralised repository.                                 |
| BR03                  | Process Collaboration Features   | The BPM solution must have the ability for multiple users to create, review, and edit models simultaneously, enabling input from stakeholders, analysts, and IT.  |
| BR04                  |                                  | The BPM Solution must provide full visibility of customer interactions by supporting customer journey mapping, external process views, and the definition and management of customer touchpoints.   |
| BR05                  | Model Types                      | The BPM solution must have the ability to make available, but not limited to various common model types, related to the full spectrum of the Enterprise i.e., business, information, data, application and technology models.                               |
| BR06                  | Process Analysis and Simulations | The BPM Solution must provide process simulation capabilities, allowing the organisation to perform "what if" scenario analysis and assess the potential impact of process changes prior to implementation.   |
| BR07                  | Process Analytics                | The BPM Solution must support systematic analysis of business processes to assess and evaluate process effectiveness, efficiency, and performance.  |
| BR08                  |                                  | The BPM Solution must enable the integration of real-world and conceptual data to present key performance indicators (KPIs) through consolidated, context-sensitive dashboards to support data-driven decision making.                                      |

| <b>Business Requirements</b> |  |   |
|------------------------------|--|---|
| <b>Req. No</b>               | <b>Requirement</b>                     | <b>Description</b>  |
| <b>BR09</b>                  |  | The BPM Solution must provide reporting capabilities, including one-click reports that clearly demonstrate business-to-IT alignment where not only Business Processes are modelled in the system  |
| <b>BR10</b>                  | <b>Process Diagnostics</b>             | The BPM Solution must be able to connect to existing line-of-business (LOB) systems (which are developed in various technologies) to extract real-time or near real-time data, providing an objective view of how business processes are executed.  |
| <b>BR11</b>                  |  | The BPM Solution must allow users to design, document, manage, analyse, and optimise business-critical processes within a single, integrated platform.  |
| <b>BR12</b>                  | <b>Process Intelligence</b>            | The BPM Solution must support process intelligence capabilities, including the use of process diagnostics, analytics, and artificial intelligence (AI), to identify bottlenecks, process deviations, risks, and opportunities for continuous improvement.                                       |
| <b>BR13</b>                  | <b>Governance. Risk and Compliance</b> | The BPM Solution must support governance, risk, and compliance (GRC) by enabling the mapping of business risks, controls, and regulatory requirements to specific process steps to support compliance management.   |
| <b>BR14</b>                  | <b>Process orchestration</b>           | The BPM solution must have the ability to extend the process diagnostics capabilities across different processes with advanced analytics capabilities and decision management capabilities. It must have the capability to design and manage the interdependencies between different processes. |
| <b>BR15</b>                  | <b>Version Control and Repository</b>  | The solution must have a central repository to manage, store, and track changes to process models (current vs. future state).   |
| <b>BR16</b>                  |  | The solution must support version control for all software components and configuration artefacts, including historical version tracking, change auditability, and controlled access to modifications.  |
| <b>BR17</b>                  | <b>Detailed Documentation</b>          | The solution must have support for defining process metadata, data objects, and system requirements within the diagram.   |
| <b>BR18</b>                  | <b>Reporting</b>                       | Ability to publish and share models in various formats (PDF, HTML) for documentation purposes.  |
| <b>BR19</b>                  |  | The BPM solution must support BPMN XML import/export, EPC import/export   |

| <b>Business Requirements</b> |                                 |  |
|------------------------------|---------------------------------|--|
| <b>Req. No</b>               | <b>Requirement</b>              | <b>Description</b>   |
| <b>BR20</b>                  | <b>Model Quality Assurance</b>  | The BPM must have the ability to allow a process to be taken through a review and approval workflow process based on user-defined workflow and role access rules.          |
| <b>BR21</b>                  | <b>Process Levelling</b>        | The BPM must have the ability to define processes clearly and in a simplified and user-friendly manner at all levels, starting at Enterprise right down to workflow level. |
| <b>BR22</b>                  | <b>Model Integration</b>        | The BPM must have the ability to integrate all model types at all levels where required based on organisational requirements.  |
| <b>BR23</b>                  | <b>Model Method Definitions</b> | The BPM must have the ability to allow for the defining of model and object method definitions as required based on organisational requirements                            |
| <b>BR24</b>                  | <b>Disaster Recovery</b>        | The tool BPM must have a built-in failover and fault tolerance in mind.  |

#### 4.2. Non-Functional Requirements

The following non-functional requirements are listed below to ensure there is a mutual understanding by all stakeholders of the scope regarding implementation of the BPM Solution:

| <b>Non-Functional Requirements</b> |                               |   |
|------------------------------------|-------------------------------|---|
| <b>Req. No</b>                     | <b>Requirement</b>            | <b>Description</b>  |
| <b>NF01</b>                        | <b>Availability</b>           | The implemented solution is available 99% of the time, 24/7. Planned downtime should be conducted outside of working hours (07:00 – 17:00)  |
| <b>NF02</b>                        | <b>Interoperability</b>       | The implement solution can operate with other products or systems in the present and future without any restricted access or implementation complexities.                                       |
| <b>NF03</b>                        | <b>Performance</b>            | The implemented solution provides fast response times with high throughput, low utilisation of computer resources, high system availability, high bandwidth, and fast data transmission speeds. |
| <b>NF04</b>                        | <b>Platform compatibility</b> | The implemented solution is compatible with the existing hardware, operating systems, and browser capabilities with the ability to extend to a cloud-based platform.                            |
| <b>NF05</b>                        | <b>Response time</b>          | The implemented solution's response time to a request for a service is quick (not more than 5 seconds) during normal system operations.   |

| <b>Non-Functional Requirements</b> |   |   |
|------------------------------------|---|---|
| <b>Req. No</b>                     | <b>Requirement</b>                      | <b>Description</b>  |
| <b>NF06</b>                        | <b>Product Usability</b>                | Provides easily understood, friendly interfaces with intuitive designs to facilitate user engagement for both technical users and business stakeholders.  |
| <b>NF07</b>                        | <b>Scalability</b>                      | Scales in record size and number of records as the organisation grows and it should have flexible, transparent pricing models (e.g., consumption-based rather than just user-based).  |
| <b>NF08</b>                        | <b>Workflow Functionality</b>           | Built-in governance workflows to manage the lifecycle of architectural artifacts.   |
| <b>NF09</b>                        | <b>Vendor Support &amp; Partnership</b> | Reliability, responsiveness, and partnership approach of the vendor (e.g., high net emotional footprint).   |
| <b>NF10</b>                        | <b>Vendor lock-in risk</b>              | The service provider must demonstrate how the proposed solution mitigates vendor lock-in. This includes the ability to export all customer data in open, machine-readable formats, support for industry standard APIs, and clear migration processes that do not require reliance on proprietary software or specialised vendor intervention. |
| <b>NF11</b>                        | <b>Deployment Architecture</b>          | Flexibility for cloud-based (SaaS) or/and on-premises installation.   |

#### **4.3. Integration Requirements**

| <b>Integration Requirements</b> |   |   |
|---------------------------------|---|---|
| <b>Req. No</b>                  | <b>Requirement</b>                                      | <b>Description</b>  |
| <b>IR01</b>                     | <b>User Information Systems</b>                         | Integration of the solution with User Information Systems for access to employee related information                          |
| <b>IR02</b>                     | <b>Identity and Access Management Systems</b>           | Integration of the solution with Identity and Access management systems to enforce authentication and authorisation policies. |
| <b>IR03</b>                     | <b>Configuration Management Database (CMDB) Systems</b> | Integration of the solution with Configuration Management Database Systems where applicable.                                  |
| <b>IR04</b>                     | <b>Exchange/Email Systems</b>                           | Integration of the solution with Exchange/Email Systems for the sending and receiving of automated emails                     |
| <b>IR05</b>                     | <b>Workflow Functionality</b>                           | Built-in governance workflows to manage the lifecycle of architectural artifacts.   |
| <b>IR06</b>                     | <b>API &amp; Connectors</b>                             | The solution should integrate with existing IT landscape systems using APIs   |
| <b>IR07</b>                     |   | The solution must be able to integrate with enterprise architecture frameworks.   |
| <b>IR08</b>                     |   | The solution must support open API  |

#### 4.4. Security Requirements

| Security Requirements |                                  |   |
|-----------------------|----------------------------------|---|
| Req. No               | Requirement                      | Description   |
| SC01                  | Authentication                   | The substantiation of the identity of a person or entity related to the enterprise or system  |
| SC02                  | Authentication and Authorisation | <ul style="list-style-type: none"> <li>Enforcement of permitted capabilities for a person or entity whose identity has been established.</li> <li>Single sign-on must be supported using protocols like SAML and authenticate using DBSA approved authentication system.</li> </ul>   |
| SC04                  | Role-Based Access Control (RBAC) | <ul style="list-style-type: none"> <li>Ability to implement Role-Based Access Control (RBAC) in managing user permissions to ensure proper stewardship of data and to ensure only authorised personnel can modify process models.</li> </ul>  |
| SC05                  | Audit                            | <ul style="list-style-type: none"> <li>The ability to provide comprehensive audit trails.</li> <li>The ability to provide audit logs attesting that the systems have been used in accordance with security policies to maintain its integrity. Audit logs must be immutable, time stamped and stored to support regulatory compliance.</li> </ul> |
| SC06                  |                                  |   |
| SC07                  |                                  | <ul style="list-style-type: none"> <li>The ability to integrate logs with SIEM technology</li> </ul>  |
| SC08                  | Information Asset Protection     | <ul style="list-style-type: none"> <li>The protection of information assets from loss or unintended disclosure, and resources from unauthorised and unintended use.</li> </ul>  |
| SC09                  | Session Management               | <ul style="list-style-type: none"> <li>Ensures that sessions are unique to each individual and cannot be guessed or shared.</li> </ul>  |
| SC010                 |                                  | <ul style="list-style-type: none"> <li>Sessions are invalidated when no longer required and timed out during periods of inactivity</li> </ul>   |
| SC11                  | Secured Communications           | <ul style="list-style-type: none"> <li>Ensures that Transport Layer Security (TLS 1.2 and above) and Secure Sockets Layer (SSL) is used where sensitive data is transmitted.</li> </ul>   |
| SC12                  |                                  | <ul style="list-style-type: none"> <li>The BPM solution must support the latest TLS encryption protocol, cipher strength above 3DES, and SHA256 or above hashing algorithm.</li> </ul>  |
| SC13                  | Security & Compliance            | <ul style="list-style-type: none"> <li>The BPM solution must comply with BPMN 2.0 (ISO/IEC 19510:2013) standard.</li> </ul>   |
| SC14                  |                                  | <ul style="list-style-type: none"> <li>Compliance with data privacy regulations (e.g., POPIA) and secure, enterprise-ready hosting options (SaaS, On-Premises).</li> </ul>  |
| SC15                  |                                  | <ul style="list-style-type: none"> <li>The service provider must ensure full South African data residency, meaning that all customer data stored,</li> </ul>  |

| Security Requirements |             |   |
|-----------------------|-------------|---|
| Req. No               | Requirement | Description   |
|                       |             | processed, and retained or backed up within South African data centres. In cases where the solution stores data outside of South Africa, the service provider must provide details of how the data is governed. |
| SC16                  |             | <ul style="list-style-type: none"> <li>The service provider must provide incident detection and response procedures, including mandatory notification of any data breach in accordance with POPIA.</li> </ul>   |

Table 3: Security Requirements

## 5. Expected Deliverables, Outputs and Timelines

The bidder will be required to deliver all documentation, systems, training, and support services specified in this RFP in accordance with agreed timelines and DBSA quality standards.

## 6. Competency and Expertise Requirements

The service provider must be able to demonstrate the experience, knowledge, and skills to successfully and reliably provide the required Business Process Modelling Solution. It is the responsibility of the service provider to ensure that allocated staff have the required knowledge, and experience to supply and deliver the required solution.

The service provider must be certified by the OEM of the proposed solution.

## 7. Project Reporting Requirements

The successful bidder will report to the relevant project governance structures based on the DBSA project methodology as indicated below:

- The service provider will report to the DBSA Head: Business Architecture & Ops Excellence or delegated personnel.
- The service provider will be expected to conclude an SLA with the DBSA and report regularly as proposed by the ICT Head: Service Management or delegated personnel with regards to the performance of the SLA.
- The service provider will be expected to engage regularly with the DBSA project team/relevant teams, as per the schedule and deliverables that will be agreed between the parties.
- The service provider will be expected to avail the environment to periodic audit to validate the services being offered.

## 8. Information Supplied by the DBSA

The DBSA will provide the appointed service provider access to the following roles for assistance for the duration of the contract period:

| Role   | Description   |
|--|---|
| <b>Head Business Architecture &amp; Ops Excellence</b> | Responsible for managing the delivery of the BPM solution from DBSA.  |
| <b>Head: ICT Service Management</b>                    | Responsible for managing SLA from a DBSA perspective.   |
| <b>Head: ICT Infrastructure</b>                        | Responsible for managing DBSA infrastructure and networks.  |
| <b>ICT Architect</b>                                   | Responsible for providing guidance on the architecture requirements, standards, deliverables, artefacts, methodology, framework, and governance of the DBSA                           |
| <b>ICT Governance Specialist</b>                       | Responsible for ensuring the appropriate incorporation of DBSA processes and reporting requirements.  |
| <b>Infrastructure Specialist</b>                       | Responsible for assisting with regards to infrastructure requirements, including servers, networks, and cabling.  |
| <b>Information Security Specialist</b>                 | Responsible for all ICT security-related matters  |
| <b>Network Specialist</b>                              | Responsible for the administration of the DBSA network environment.   |
| <b>Subject Matter Experts</b>                          | Responsible for having deep, specialized knowledge and experience in a particular field making them the go-to source for accurate information, guidance, and complex problem-solving, |

Table 4: DBSA Supporting Roles

## 9. Preparation of Proposal

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

- Provide an overview of the company profile and experience.
- Provide certifications and accreditations related to the scope of work.
- Provide a declaration that the professional services provider understands and is qualified and prepared to perform the scope of work as defined in these terms of reference.
- Provide confirmation of the output that will be delivered by the service provider, based on the scope of the work as defined in these terms of reference.
- Provide estimated time required for completion and delivery.
- Provide estimated fees including hours to be spent and rates.

## 10. Confidentiality and Intellectual Property

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

## 11. Pricing, Contracts and Payment Terms

**Payments:** Payment will be made within 30 days of the achievement of the specific work deliverables and milestones as agreed within the Project Scope of Work.

**Agreed Fees:** The service provider shall be required to undertake the assignment within the agreed fee set as per the proposal and no increase in fees or upfront payment of fees for work not completed will be negotiated.

**Foreign Exchange Rates:** The service provider is expected to account and take into consideration any fluctuations in foreign exchange rates.

**Project Costs:** The service provider shall provide the total fixed price for the project based on the Scope of Work.

**Pricing Proposal:** The service provider shall provide their pricing proposal based on the completion of the scope of work.

## 12. Reservations

The DBSA expressly reserves the following rights:

- To appoint more than one service provider.
- To waive any or all irregularities in the proposals submitted.
- To retain the right not to select any service provider.
- To cancel the request for proposals.

## 13. Confidentiality and Intellectual Property

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

## ANNEXURE A

### PRICING SCHEDULE

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

This template must be completed in full and included to Pricing Proposal submitted.

The expectations for pricing and contract options of this proposal are outlined below:

- A clear distinction between professional pricing and support services pricing must be clearly indicated based on the pricing table format provided in this Terms of Reference.
- Support services pricing must be clearly categorised (with any expected escalations) over the support services period of minimum three (3) years.
- Contract termination options and charges must be clearly identified and documented.
- Provide complete “packaged” pricing.
- Standard pricing plan options must be clearly specified.
- Tiered pricing for the various service options must be clearly specified.
- Payment terms will be negotiated and agreed with the winning service provider during contracting.

| Pricing: Professional Services (Implementation) |      |                                       |     |             |
|---|------|---------------------------------------|-----|-------------|
| No  | Code | Activity                              | QTY | Price (ZAR) |
| 1.0   |      | Functional Requirements Specification | 1   | R           |
| 1.1   |      | Solution Design Document              | 1   | R           |
| 1.2   |      | Test Plan and Test Cases Development  | 1   | R           |
| 1.3   |      | Implementation Execution              | 1   | R           |
| 1.4   |      | Testing Execution                     | 1   | R           |
| 1.5   |      | Skills and Knowledge Transfer         | 1   | R           |
| 1.6   |      | Post Implementation Support           | 1   | R           |
| <b>Price</b>                                    |      |                                       | R   |             |
| <b>VAT</b>                                      |      |                                       | R   |             |
| <b>Total Price</b>                              |      |                                       | R   |             |

The service provider must use the following table format to specify pricing for support services to be provided over the contractual period of three (3) years:

**NOTE:** It should also be noted that the list of support services below is not limited to what is defined in the table below. Additional support services activities may be added if necessary.

| Pricing (Support Services) |      |   |     |                    |                    |                    |
|----------------------------|------|---|-----|--------------------|--------------------|--------------------|
| No                         | Code | Activity  | QTY | Year 1 Price (ZAR) | Year 2 Price (ZAR) | Year 3 Price (ZAR) |
| 1.0                        |      | • Software Configuration Management                             |     | R                  | R                  | R                  |
| 2.0                        |      | • Software Integration Management                               |     | R                  | R                  | R                  |
| 3.0                        |      | • Change Management   |     | R                  | R                  | R                  |
| 4.0                        |      | • Application Support Management                                |     | R                  | R                  | R                  |
| 5.0                        |      | • License Costs (10 Author and 100 concurrent viewing licences) |     | R                  | R                  | R                  |
|                            |      | <b>Price</b>  |     |                    |                    | <b>R</b>           |
|                            |      | <b>VAT</b>  |     |                    |                    | <b>R</b>           |
|                            |      | <b>Total Costs</b>  |     |                    |                    | <b>R</b>           |

**NOTE:** Any yearly escalations (if applicable) should be included and clearly specified in the pricing details.

## CONFIDENTIALITY AND INTELLECTUAL PROPERTY

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

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

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

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

**RFP087/2026: PROCUREMENT OF A BUSINESS PROCESS MODELLING AND ANALYSIS SOLUTION**

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** \_\_\_\_\_

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> 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 |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

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<sup>1</sup> 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 consortium<sup>2</sup> 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.

<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

**SBD 4**

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

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

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

|                    |                         |
|--------------------|-------------------------|
| .....<br>Signature | .....<br>Date           |
| .....<br>Position  | .....<br>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**

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### 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 **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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

### 1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

|   | POINTS     |
|---|------------|
| PRICE   | 80/90      |
| PREFERENCE POINTS                                   | 20/10      |
| <b>Total points for Price and Preference Points</b> | <b>100</b> |

- 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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps} = \mathbf{80} \left( \mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left( \mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) \end{array}$$

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps} = \mathbf{80} \left( \mathbf{1} + \frac{\mathbf{Pt} - \mathbf{Pmax}}{\mathbf{Pmax}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left( \mathbf{1} + \frac{\mathbf{Pt} - \mathbf{Pmax}}{\mathbf{Pmax}} \right) \end{array}$$

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)<br>(To be completed by the organ of state) | Number of points allocated (80/20 system)<br>(To be completed by the organ of state) | Number of points claimed (90/10 system)<br>(To be completed by the tenderer) | Number of points claimed (80/20 system)<br>(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.

|   |
|---|
| <p>.....<br/><b>SIGNATURE(S) OF TENDERER(S)</b></p> <p><b>SURNAME AND NAME:</b> .....</p> <p><b>DATE:</b>.....</p> <p><b>ADDRESS:</b>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> |
|---|

## 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><b>Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</b><br/>                     (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p><b>The Database of Restricted Suppliers now resides on the National Treasury’s website(<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</b></p> | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.1.1 | If so, furnish particulars:   |                                 |                                |
| 4.2   | <p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p><b>The Register for Tender Defaulters can be accessed on the National Treasury’s website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</b></p>  | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.2.1 | If so, furnish particulars:   |                                 |                                |
| 4.3   | <p>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?</p>   | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.3.1 | If so, furnish particulars:   |                                 |                                |
| 4.4   | <p>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?</p>  | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.4.1 | If so, furnish particulars:   |                                 |                                |

## **Annexure D**

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

## **Annexure E**

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

## **Annexure F**

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

## **Annexure G**

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

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

**Annexure H**

**[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:

| <b>Item</b>   | <b>YES</b> | <b>NO</b> |
|---|------------|-----------|
| Is the Bidder familiar with the General Conditions of Contract prescribed by the National Treasury? |            |           |

## Annexure I

### Tax Compliant Status and CSD Registration Requirements

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

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

**CSD Registration Number:**



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

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