

REQUEST FOR QUOTATION

YOU ARE HEREBY INVITED TO SUBMIT QUOTATIONS FOR THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED	
BID NUMBER:	RFQ020/2023
RFQ ISSUE DATE:	09 March 2023
COMPULSORY BRIEFING	<p>Tender briefing will be done online via Microsoft teams. Bidders are advised to use the link below to join the briefing session.</p> <p>Microsoft Team</p> <p>Link: Click here to join the meeting Meeting ID: 324 294 030 652 Passcode: saqydU Download Teams Join on the web</p> <p>17 March 2023 @11H00 (Johannesburg time)</p>
CLOSING DATE AND TIME:	23 March 2023 at 23H55
RFQ VALIDITY PERIOD	90 days (COMMENCING FROM THE RFQ CLOSING DATE)
DESCRIPTION	Professional Service Provider (PSP) to assess terms of reference, evaluate bids, provide inputs in steering committees, as well as thought leadership and quality assurance for an infrastructure investment planning research study of the digital infrastructure/ICT sector in South Africa.
DOCUMENTS DELIVERY ADDRESS:	<p>ELECTRONIC SUBMISSIONS</p> <p>a) Bidders that wish to submit a tender response must send an email to SbongaM@dbsa.org indicating their participation. b) This must be done three (3) working days before submission day. c) Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically. d) Closing time for the OneDrive Link submissions - 23h55 on the 21st of March 2023 (Telkom Time)</p>
TENDER TECHNICAL AND GENERAL QUERIES	E-mail address: SbongaM@dbsa.org

COMPLAINTS ABOUT THIS
RFQ OR TENDER PROCESS

E-mail address: scmqueries@dbsa.org

NB: All enquiries regarding this RFQ must be forwarded to the stated email address above within the day after the RFQ has been issued. No enquiries from bidders will be entertained after the closing date of this RFQ and during the subsequent evaluation processes. DBSA however reserves the right to clarify any information with any bidder regarding their response to this RFQ.

All responses must be submitted to the above-mentioned address at the time specified.



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

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

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER		CODE		NUMBER	
CELLPHONE NUMBER					
FACSIMILE NUMBER		CODE		NUMBER	
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS		TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No: MAAA
ORIGINAL AND VALID B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE OR ORIGINAL CERTIFIED COPY		TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		ORIGINAL B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[AN ORIGINAL AND VALID B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS PLEASE COMPLETE AS PER SECTION 3 OF THE TERMS AND CONDITIONS BELOW					

NOTE: Whether or not you are submitting a bid, please email this schedule to the Procurement Specialist.

	YES	NO
We will bid:		

TERMS AND CONDITIONS FOR BIDDING

1. RFQ SUBMISSION:

- 1.1. RFQ BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED—(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
- 1.4. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
- 1.5. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
- 1.6. PARTICIPATION IN THE TENDER PROCESS IS SUBJECT TO COMPLIANCE WITH THE TENDER CONDITIONS CONTAINED IN THIS RFQ DOCUMENT.
- 1.7. THE SUCCESSFUL BIDDER MAY BE REQUIRED TO CONCLUDE A FORMAL WRITTEN CONTRACT WITH THE DBSA DEPENDING ON THE NATURE OF THE SERVICES TENDERED FOR.
- 1.8. IF THE BIDDER'S SUBMISSION OF A QUOTATION IS SUCCESSFUL, THE DBSA SHALL APPOINT THE BIDDER TO EXECUTE OR PROVIDE THE REQUIRED SERVICES OR GOODS. WHERE NO FORMAL WRITTEN CONTRACT IS REQUIRED TO BE CONCLUDED WITH THE SUCCESSFUL BIDDER, THE DBSA SHALL PLACE A PURCHASE ORDER WITH THE BIDDER AND THE AFORESAID GENERAL CONDITIONS OF CONTRACT SHALL APPLY TO ANY SUBSEQUENT PURCHASE ORDER. IN THE EVENT THAT A FORMAL WRITTEN CONTRACT IS REQUIRED TO BE CONCLUDED WITH THE BIDDER, THE PARTIES SHALL EXECUTE A SERVICE CONTRACT AND THEREAFTER THE DBSA SHALL PLACE A PURCHASE ORDER.
- 1.9. NO SERVICES MUST BE RENDERED OR GOODS DELIVERED BEFORE AN OFFICIAL DBSA APPOINTMENT LETTER HAS BEEN ISSUED, A SERVICE CONTRACT SIGNED WHERE APPLICABLE, AND A PURCHASE ORDER HAS BEEN RECEIVED BY THE SUPPLIER.
- 1.10. LATE AND INCOMPLETE SUBMISSIONS WILL NOT BE ACCEPTED.
- 1.11. ANY BIDDER WHO HAS REASONS TO BELIEVE THAT THE RFQ SPECIFICATION IS BASED ON ANY SPECIFIC BRAND MUST INFORM DBSA IN WRITING BEFORE THE RFQ CLOSING DATE. IT SHOULD HOWEVER, BE NOTED THAT DBSA RESERVES THE RIGHT TO ISSUE BRAND SPECIFIC SPECIFICATIONS "EQUIVALENT" / REQUIREMENTS TENDER.
- 1.12. BIDDERS ARE REQUIRED TO COMPLETE ANNEXURE B FOR ALL PRICE QUOTATIONS EXCEEDING THE VALUE OF R30 000 (VAT INCLUDED) AND ATTACH TO THE FUNCTIONAL/TECHNICAL PROPOSAL WHERE THE TENDERING PROCESS WILL USE A ONE ENVELOPE SYSTEM.

OR

WHERE THE TENDERING PROCESS WILL USE A TWO FOLDERS SYSTEM I.E. BIDDERS MUST

SUBMIT THE PRE-QUALIFYING CRITERIA AND FUNCTIONAL PROPOSAL IN ONE ENVELOPE/FOLDER (TOGETHER WITH RELEVANT COPIES) AND THE COMPLETED ANNEXURE B (PRICING) AND PREFERENCE POINTS PROPOSALS IN A SEPARATE ENVELOPE/FOLDER (TOGETHER WITH THE RELEVANT COPIES). BOTH ENVELOPES / FOLDERS MUST BE CLEARLY MARKED.

NOTE: NO PRICE AND/OR RATES MUST BE INCLUDED IN THE FUNCTIONAL/TECHNICAL PROPOSAL AS THIS WILL RESULT IN DISQUALIFICATION.

- 1.13. BIDDERS ARE ALSO REQUIRED TO COMPLETE AND SIGN ALL DECLARATIONS AS PART OF THE RFQ DOCUMENTATION PACK THE STANDARD BIDDING DOCUMENTS (SBD) PRESCRIBED BY THE NATIONAL TREASURY ATTACHED AS ANNEXURE C.**
- 1.14. THE SUCCESSFUL BIDDER WILL BE THE BIDDER THAT SCORES THE HIGHEST NUMBER OF POINTS IN THE PRICE AND PREFERENCE EVALUATION, UNLESS THE DBSA EXERCISES ITS RIGHT TO CANCEL THE RFP, IN LINE WITH THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**
- 1.15. ALL PRICES MUST BE QUOTED IN SOUTH AFRICAN RAND (ZAR)**
- 1.16. THE COST OF MARKETING AND ADVERTISING, AND OTHER CHARGES MUST BE INCLUDED IN THE TOTAL PRICE QUOTED, IF THESE ITEMS ARE REQUESTED AS PART OF THE DBSA COST TEMPLATE / MODEL OF THIS RFQ. BIDDERS SHOULD UNDER NO CIRCUMSTANCES INCLUDE ANY ADDITIONAL COST ELEMENTS WHICH HAVE NOT SPECIFICALLY BEEN REQUESTED FOR AS PART OF THIS RFQ. IF ADDITIONAL ITEMS ARE SUGGESTED BY ANY BIDDER, THEN THESE ITEMS MUST BE SEPARATELY SPECIFIED WITH A CLEAR MOTIVATION OF WHY THESE ADDITIONAL ITEMS MAY BE REQUIRED. IT SHOULD ALSO BE FURTHER STATED WHETHER THE WORKABILITY OF THE SOLUTION PROPOSED IS DEPENDENT ON SUCH ADDITIONAL ITEMS OR NOT.**
- 1.17. BIDDERS ARE ALSO REQUESTED TO SEPARATELY PROVIDE A DETAILED COST BREAKDOWN OF ALL ITEMS TO BE PROVIDED AS PART OF THEIR RESPONSE TO THIS RFQ, WHICH CLEARLY DEPICTS THE ITEM DESCRIPTION (BRAND NAME, PRODUCT CODE) AND ASSOCIATED QUANTITIES. FAILURE TO PROVIDE THIS INFORMATION WILL INVALIDATE THE RFQ RESPONSE ON THE BASIS OF INCOMPLETENESS. THE TOTAL COST OF THE RFQ RESPONSE BASED ON THE DBSA COST TEMPLATE / MODEL SHOULD EXACTLY MATCH THE TOTAL COST OF THE DETAILED COST BREAKDOWN. IN THE EVENT OF ANY DISCREPANCIES, THEN THE HIGHER AMOUNT OF THE 2 DOCUMENTS WILL BE USED AS BASIS FOR THE PRICE EVALUATIONS OF THIS RFQ RESPONSE.**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.**
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.**
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E- FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.**
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.**
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.**
- 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER**

DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE.

3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- 3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? YES NO
- 3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? YES NO
- 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.

4. COMPLIANCE REQUIREMENTS

- 4.1 All BIDDER MUST SUBMIT THEIR ORIGINAL AND VALID BBBEE STATUS LEVEL VERIFICATION CERTIFICATE OR ORIGINAL CERTIFIED COPY OR ORIGINAL SWORN AFFIDAVIT THEREOF, SUBSTANTIATING THEIR BBBEE STATUS.
- 4.2 THE SUBMISSION OF SUCH CERTIFICATES MUST COMPLY WITH THE REQUIREMENTS OF INSTRUCTIONS AND GUIDELINES ISSUED BY THE NATIONAL TREASURY AND MUST BE IN ACCORDANCE WITH THE APPLICABLE NOTICES PUBLISHED BY THE DEPARTMENT OF TRADE AND INDUSTRY IN THE GOVERNMENT GAZETTE.

5. PRE-QUALIFICATION CRITERIA

Please ensure you submit the requested information as per eligibility criteria on page 7 and 14, Bidders failing to provide the requested information will lead to disqualification.

6. FUNCTIONAL EVALUATION

6.1 APPLICABLE-REFER TO TERMS OF REFERENCE – **Eligibility criteria**

7. PRICE

7.1 Those Bidders which have passed the first and second stages of the tender process will be scored on the basis of the price offered. The price must be fixed, no price adjustment shall be allowed.

8. ORAL PRESENTATIONS

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

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

9. REASONS FOR DISQUALIFICATION

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

10. RIGHT TO CANCEL

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

11. DECLARATION BY BIDDER

I, _____ THE _____ UNDERSIGNED
(NAME) CERTIFY THAT:

- i. I HAVE READ, UNDERSTOOD AND UNCONDITIONALLY ACCEPT THE CONDITIONS OF THIS RFQ.
- ii. I HAVE SUPPLIED THE REQUIRED INFORMATION AND THE INFORMATION SUBMITTED AS PART OF THIS RFQ IS TRUE AND CORRECT.

.....

SIGNATURE OF BIDDER

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

Stage 1: Responsiveness

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

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 in submitting Tender as two stage folders Folder 1 – Pre- qualifying and Functionality proposal Folder 2 - Pricing proposal	Pre-Qualifier	Y
2.	Attendance registers for Compulsory Briefing session.	Pre-Qualifier	Y
3.	Minimum of a post-graduate degree (NQF 8) from a recognized university in the ICT field for the project advisor	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)
4.	Standard conditions of tender as required.	48 hours	Y
5.	Returnable documents completed and signed.	48 hours	Y
6.	Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be fully registered & compliant in order to do business with the DBSA.	48 hours	Y
7.	A valid and active Tax Compliance Status Pin issued by SARS.	48 hours	Y

Stage 2: Functional criteria

2nd Stage – Functional Evaluations (65%)

Description	Weight
A. Company Experience	30
B. Experience of the proposed project advisor	50
C. References	20
TOTAL	100
THRESHOLD	65

The minimum threshold for Functional / Technical Evaluation for this tender is 65 out of a possible 100 points.

Stage 3: Price and preference evaluations (80/20)

**APPOINTMENT OF SERVICE PROVIDER TO ACT AS PROJECT ADVISOR TO
ASSESS TERMS OF REFERENCE, EVALUATE BIDS, PROVIDE INPUTS IN
STEERING COMMITTEES, AS WELL AS THOUGHT LEADERSHIP AND
QUALITY ASSURANCE FOR AN INFRASTRUCTURE INVESTMENT PLANNING
RESEARCH STUDY OF THE DIGITAL INFRASTRUCTURE/ ICT SECTOR IN
SOUTH AFRICA**

09 MARCH 2023

1. INTRODUCTION

The Development Bank of Southern Africa (DBSA) is a development finance institution (DFI) that promotes economic and social development by mobilizing financial and other resources from the national and international private and public sectors for sustainable development projects in South Africa and the rest of the African continent. The DBSA's mandate encapsulates the provision of financial, technical and other assistance, with a focus on infrastructure investment.

As a State-Owned Entity (SoE), the DBSA is aligned with the country's, regional, and international policy imperatives. Some of the national policies include the National Development Plan (NDP), the Integrated Urban Development Framework (IUDF), and the National Climate Change Response Policy (NCCRP). Within the region the DBSA is aligned to Regional Infrastructure Master Plans and Africa Union's Agenda 2063. Internationally, the DBSA is aligned to the Sustainable Development Goals (SDGs) of the United Nations, the Paris Agreement, and the New Urban Agenda (NUA), with the purpose of accelerating economic growth and development, as well as eliminating poverty and reducing inequality. In the context of the above, the Bank focuses on Water, Transport, Energy and ICT sectors to promote economic infrastructure and focuses on the Education, Health and Housing sectors to deepen social infrastructure.

2. BACKGROUND AND CONTEXT

The DBSA has partnered with the National Planning Commission (NPC), in order to assess what investments in digital infrastructure (information, communication and technology) are required between now and 2030, 2040 and 2050, that will make it possible to achieve the targets as specified in the National Development Plan (NDP), the National Infrastructure Plan (NIP2050), Sustainable Development Goals (SDGs), and other key national policies.

Impetus for this research also arises from the National Infrastructure Plan 2050 (NIP2050) which was adopted by Cabinet in April 2022. It is South Africa's first long-term infrastructure plan. It explicitly references the NDP as its mandate. Its focus areas are bulk energy, bulk water, freight, and digital infrastructure. Infrastructure South Africa (ISA) in

the Presidency is the custodian of the NIP2050, in collaboration with the Department of Public Works and Infrastructure.

The study will focus on building an accurate ‘gap analysis’ of current investment levels versus the investment levels required to achieve the NDP/SDG/NIP2050 goals with respect to digital infrastructure. This will produce an accurate assessment of the public and private investments

required through to 2050 to achieve those goals, with milestones for 2030 and 2040 as well. An adapted version of the World Bank’s Beyond the Gap (BtG) analytical framework¹ will be used for this work. The logic of this analysis is as follows:



The advantage of using this specific methodological framework is that it allows for comparability across countries, and it has been recently implemented by the DBSA in partnership with several national line departments, including water, transport, basic education and higher education. BtG has moved the focus of the debate regarding infrastructure investment needs away from a simple focus on spending more, toward a focus on spending better on the right objectives, using relevant metrics. It provides a systematic approach to estimating the infrastructure funding needed to close service gaps. By exploring thousands of scenarios, it shows how funding needs depend on key policy choices in pursuing relevant development goals.

Ultimately the research paper aims to generate a clear framing of future investment requirements and the role that different public and private actors can play to make these investments happen. This will provide the basis for convening meaningful stakeholder dialogues about what would be required for these roles to become a reality. It is arguable that lack of funding is not a problem in the South African context. What is lacking is an appropriate basis for trust within active working coalitions that assemble institutional configurations to achieve a shared goal by investing public and private funds in an

appropriate way. Sectoral reports are less important than the outcomes of facilitated partnering to agree on strategic missions and investment strategies.

¹ Rozenberg, Julie; Fay, Marianne. 2019. Beyond the Gap: How Countries Can Afford the Infrastructure They Need while Protecting the Planet. Sustainable Infrastructure; Washington, DC: World Bank. © World Bank. <https://openknowledge.worldbank.org/handle/10986/31291> License: CC BY 3.0 IGO.”

3. OBJECTIVES OF THE RESEARCH STUDY

The DBSA, with the NPC as its partner, are seeking to ultimately appoint a Service Provider (with the support of a project advisor, to which this terms of reference apply), with the following objectives:

- To quantify the investments that are required between now and 2030, and extended to 2040 and 2050, in terms of both new capital and operations and maintenance (O&M), that will make it possible to achieve the digital infrastructure (information, communication and technology) targets as specified in the NDP, NIP2050, SDGs, and other key national policies.
- To highlight infrastructure cost drivers and the implications of different policy choices.
- To engage policy makers, to the extent possible, to work through the implications of policy choices and their trade-offs, in terms of costs and service levels.

The primary research question that must be addressed has been articulated as follows:

Taking into account the ICT supply-side value chain that stretches from the point where the internet enters a country (the first mile), passes through that country (the middle mile) to reach the end user (the last mile), and certain hidden elements in between (the invisible mile), what investments are required between now and 2050 that will make it possible to achieve the digital infrastructure (information, communication and technology) targets as specified in the NDP, NIP2050, SDGs and other key national policies?

Several supplementary research questions have also been identified which need to be reviewed.

The primary output will be an overview report, approximately 40 pages, plus relevant appendices that will provide the basis for further detailed work.

4. SCOPE OF WORK

In light of the above, the DBSA and NPC seek to appoint a service provider to act as a project advisor to support the DBSA/NPC research team as follows:

- To conduct a detailed review of the draft terms of reference that will be used for the subsequent appointment of a service provider that will conduct the above study, to ensure

that the terms of reference accurately reflects the digital infrastructure/ICT terrain both locally and internationally.

- To form part of the Bid Evaluation Committee (BEC) together with DBSA/NPC project team that will evaluate the bids of service providers.
- To form part of the DBSA/NPC Steering Committee that will provide oversight, thought leadership and quality assurance to the work of the service provider during implementation.
- To perform any other tasks that may be deemed necessary for the successful completion of the project (bidders to specify these in their submissions).

5. KEY DELIVERABLES AND TIME FRAMES

The following key deliverables are to be provided by the project advisor:

<u>Milestone</u>	<u>Description</u>	<u>Deliverables</u>	<u>Time Frame</u>
Milestone 1: Final BtG ToR to be used to appoint a service provider via an RFP	Based on the draft BtG ToR that has been developed for the above study, review and submit a revised ToR providing inputs and enhancements (with justifications) to the ToR.	Deliverable 1: Revised draft BtG ToR Deliverable 2: Meeting with the DBSA/NPC project team to present, obtain inputs, and finalise the ToR Deliverable 3: Final BtG ToR	Revised draft ToR one (1) month after the signing of the Contract with the project advisor
Milestone 2: Bid evaluation committee(BEC) evaluation report	In conjunction with DBSA and NPC, evaluate service provider bids according to the final approved criteria. Recommended service provider to then be approved by DBSA.	Deliverable 4: Final bid evaluation report (produced by DBSA SCM based on individual BEC member inputs)	TBC but typically within one (1) month of the closing of the RFP (from service providers)
Milestone 3: Interim BtG deliverable(s)	In conjunction with DBSA and NPC, review interim deliverable(s) such as the inception report and any other deliverables identified in the inception report.	Deliverable 5: Final interim deliverable(s)	TBC (inception report is typically finalised within one (1) month of signing the contract by the service provider)

Milestone 4: Final BtG report approved by the Steerco (DBSA, NPC and project advisor)	This will include attending all Steerco meetings and providing oversight, thought leadership and quality assurance during implementation, as well as approval of the final deliverable.	Deliverable 6: Final Steerco-approved BtG report (produced by independent service provider).	It is estimated at this stage that the study will take 6 months to complete (however this will be confirmed when a service provider is appointed).
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6. SUMMARY OF OUTPUTS

Deliverable	Number – submission/s or meeting/s	Types of deliverables
Final BtG ToR	1	Review the draft ToR based on various strategic documents (e.g., 2016 National Integrated ICT Policy White Paper, Digital Economy Master Plan, BtG report 2019, BtG report in SA 2022, etc.). This ToR is to be finalised in collaboration with the Steerco.
BEC evaluation report	1	The report is compiled by DBSA, but the project advisor will evaluate bids as part of the BEC based on the process outlined by DBSA. There will be an initial BEC briefing meeting and a possible moderating meeting at the end.
Steerco meetings (virtual)	6	In collaboration with the Steerco, review and input to monthly progress reports from the service provider.
Interim BtG deliverables	1-2	In collaboration with the Steerco, review and approve draft deliverables produced by the service provider such as the inception report and any others that are included in the final scope of work.
Final BtG report	1	In collaboration with the Steerco, review and approve the draft report from the contracted service provider.

7. REQUIRED SKILLS AND EXPERIENCE

The following is a brief description of some of the key skills and experience the DBSA and NPC believe are necessary for the suitably qualified project advisor to possess:

- Minimum of a university post graduate qualification (NQF 8) from a recognised university in the ICT field.
- Understanding of critical development issues in the ICT sector, its subsectors, and the sector value chain.
- Understanding of disruptive technologies in the ICT sector.
- Experience with economic scenario development and financial analysis/modelling in the ICT sector.
- Understanding of economic development.

Registration with a relevant ICT Sectoral Professional Body would be an added advantage.

An indication of the prospective advisor’s track record (CV, list of similar previous work and research conducted) in the areas of expertise detailed above should accompany the proposal.

8. PROPOSAL STRUCTURE

The tenderer must structure their technical proposals as follows:

- a) Company experience
- b) Experience of the proposed project advisor
- c) References

9. EVALUATION CRITERIA

Functional evaluation criteria	Total score	100
	Minimum threshold	65
Price and BEE	Price	80
	BEE	20

Only those Bidders that score 65 points or higher (out of a possible 100) during the functional evaluation will be evaluated during the second stage of the Bid. Bidders are required to submit supporting documentation demonstrating their compliance with each requirement, where applicable. The Functional Criteria that will be used to test the capability of Bidders are as follows:

Technical Proposal	Scoring	Maximum Points
A. COMPANY EXPERIENCE		30
<p>The company must have at least 10 years' experience in related assignments including knowledge and understanding of the ICT sector and subsectors (i.e. policy, regulations, investments, disruptive technologies, etc.), and economic modelling amongst others (aligned to section 7 above).</p>	<p>Excellent: 30 points = The bidder with relevant experience exceeding 10 years</p> <p>Good: 21 points = The bidder with relevant experience of between 6 and 9 years</p> <p>Acceptable: 15 points = The bidder with relevant experience of between 3 and 5 years</p> <p>Unacceptable: 0 points = The bidder with relevant experience of 2 years or less</p>	
B. EXPERIENCE OF THE PROPOSED PROJECT ADVISOR		50
<p>The CV of the proposed project advisor to be deployed to the assignment indicating the relevant experience in the following:</p> <ul style="list-style-type: none"> Criteria 1: Minimum of 15 years practical experience specifically in the ICT sector and subsectors (i.e. policy, regulations, investments, disruptive technologies, etc.), and economic modelling amongst others (aligned to section 7 above). Criteria 2: Completed similar or related assignments in the last 5 years. Please refer to Annexure A of this document for the format in which the required information must be provided. 	<p>The proposed project advisor must provide a detailed CV and complete Annexure A showing recent and relevant projects worked on</p> <p><u>Criteria 1: (Weight: 50% = 50/2 = 25 points)</u></p> <p>Excellent: 25 points = 15 years or more experience</p> <p>Good: 14 points = 11 to 14 years' experience</p> <p>Acceptable: 10 points = 7 to 10 years' experience Unacceptable: 0 points = 6 years or less experience</p> <p><u>Criteria 2: (Weight: 50% = 50/2 = 25 points)</u></p> <p>Excellent: 25 points = 4 or more assignments Good: 14 points = 3 assignments</p> <p>Acceptable: 10 points = 2 assignments</p> <p>Unacceptable: 0 points = 1 assignment or less</p>	

C. REFERENCES		20
<ul style="list-style-type: none"> • Three (3) or more verifiable references where similar assignments were completed by the company in the past 5 years. • The reference letters must at minimum contain the following details/information: <ul style="list-style-type: none"> a) Nature and description of the assignment b) Scope of work of the bidder in the assignment c) Date completed d) Contact details of the client <p>(Note: A letter for a panel appointment does not count. The reference letters must be signed, dated and on the official client's letterhead.).</p>	<p>Excellent: 20 points = 3 or more reference letters fully compliant</p> <p>Good: 14 points = Two reference letters fully compliant</p> <p>Acceptable: 10 points = One reference letter fully compliant</p> <p>Unacceptable: 0 points = non-compliant reference letters attached</p>	
Total Points		100
Minimum Threshold for Functionality		65

10. INFORMATION SUPPLIED BY DBSA AND NPC

The DBSA and NPC will provide access to appropriate documents for the advisor for the purposes of the assignment.

11. INTELLECTUAL PROPERTY

All data collected, products and deliverables shall be regarded as the exclusive

intellectual property of the DBSA and NPC for use as they please in promoting their organisations' future business interests. Furthermore, the advisor undertakes to treat all work pertaining to this project with the highest degree of possible confidentiality for the duration of the project and afterwards.

12. PRICING SCHEDULE

Deliverable (A)	Estimated number of hours (B)	Proposed number of hours by bidder (C)	Motivation if deviation from estimated number of hours (D)	Rate (R/hr) (E)	Total (F) (based on column C, proposed number of hours by bidder)
Final BtG ToR	12				
BEC evaluation report	12				
Steerco meetings (virtual)	15				
Interim BtG deliverables	5				
Final BtG report	12				
Any other tasks deemed necessary per section 4	-				
Sub-total					
VAT @15%					
Grand total					
Disbursements					
Contract Price					

Note: Costs will be compared based on the grand total excluding disbursements. Preference will be given to the use of National Treasury rates for disbursements.

FEES AND ASSUMPTIONS

FORM OF OFFER AND ACCEPTANCE (AGREEMENT)

FORM OF OFFER

THE CONSULTANT IS TO COMPLETE AND SIGN THE FORM OF OFFER

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

RFQ 020/2023 - Professional Service Provider (PSP) to assess terms of reference, evaluate bids, provide inputs in steering committees, as well as thought leadership and quality assurance for an infrastructure investment planning research study of the digital infrastructure/ICT sector in South Africa.

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 VALUE ADDED TAX IS

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

This offer may be accepted by the Employer by signing the Acceptance part of this Form of Offer and Acceptance and returning one copy of this document to the Tenderer before the end of the period of validity stated in the Tender Data, whereupon the Tenderer becomes the party named as the consultant in the Conditions of Contract identified in the Contract Data.

Signature(s)

Name(s)

Capacity

**For the
*Tenderer***

(Name and address of organisation)

**Name and
signature of
witness**

Date

ANNEXURE B

EVALUATION CRITERIA TABLES

Table A: (Document format for Bidder Experience)

Name of the project and year completed	The role of the bidder	Monetary size of the project	Project details/description	Contactable reference for each of the projects
				Name: Designation: Contact number: Email address:

[Note to the Bidder: The Bidder may provide this information in a separate page provided it includes the information required per the template and it is clearly marked that it is responding to this Technical Evaluation Criteria.]

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

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

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

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

2.2 Identity Number:
.....

2.3 Position occupied in the Company (director, trustee, shareholder²):
.....

2.4 Company Registration Number:
.....

2.5 Tax Reference Number:
.....

2.6 VAT Registration Number:

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

¹"State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

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

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

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:
Name of state institution at which you or the person connected to the bidder is employed :
Position occupied in the state institution:

Any other particulars:
.....
.....
.....

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

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

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

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

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

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

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between **YES/NO**

any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

2.10.1 If so, furnish particulars.

.....

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

2.11.1 If so, furnish particulars:

.....

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

Full Name	Identity Number	Personal Reference Number	Tax Number	State Number / Employee Peral

4. DECLARATION

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature Date

.....
Position Name of bidder

May 2011

CONTRACT FORM - PURCHASE OF GOODS/WORKS

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

PART 1 (TO BE FILLED IN BY THE BIDDER)

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to (name of institution)..... in accordance with the requirements and specifications stipulated in bid number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Technical Specification(s);
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES	
1.
2.
DATE:

CONTRACT FORM - PURCHASE OF GOODS/WORKS

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I..... in my capacity as..... accept your bid under reference number dated... ..for the supply of goods/works indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating delivery instructions is forthcoming.
3. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

ITEM NO.	PRICE (ALL APPLICABLE TAXES INCLUDED)	BRAND	DELIVERY PERIOD	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

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

SIGNED ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1.

2.

DATE

ANNEXURE D

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

ANNEXURE E

Where Applicable, Bidders are required to include, as Annexure E 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 F

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.



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

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