

## 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>RFP009/2026</b>
<b>COMPULSORY BRIEFING SESSION DETAILS:</b>	<p><b>20<sup>th</sup> February 2026</b></p> <p><b>Time: 10H30am</b></p> <p><b>MS TEAMS LINK:</b> <a href="#">Compulsory Briefing Meeting Link</a></p>
<b>CLOSING DATE:</b>	<b>04<sup>th</sup> March 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>	SOURCING OF A SERVICE PROVIDER TO CONSOLIDATE, REVIEW, EDIT, AND PUBLISH OUTPUTS FROM THE ANNUAL RESEARCH COLLOQUIUM INTO THE DBSA ANNUAL INFRASTRUCTURE DEVELOPMENT COLLOQUIUM BOOK FOR A PERIOD OF THREE (03) YEARS
<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:Tumim@dbsa.org">Tumim@dbsa.org</a> <b>ONLY</b>, quoting the RFP Number on the subject of the e-mail. This must be done three (3) working days before the submission date.</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>27 February 2026 16:00</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 RFP009/2026 is 04<sup>th</sup> March 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: RFP009/2026**

**DESCRIPTION: SOURCING OF A SERVICE PROVIDER TO CONSOLIDATE, REVIEW, EDIT, AND PUBLISH OUTPUTS FROM THE ANNUAL RESEARCH COLLOQUIUM INTO THE DBSA ANNUAL INFRASTRUCTURE DEVELOPMENT COLLOQUIUM BOOK FOR A PERIOD OF THREE (03) YEARS**

**COMPULSORY BRIEFING: 20 February 2026** Tender briefing will be done online via Microsoft teams.

**COMPULSORY BRIEFING LINK:** [Compulsory Briefing Meeting Link](#)

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


**Closing time for the OneDrive Link submissions – 16H00 on the 27 February 2026 (Telkom Time)**

**BID SUBMISSION CLOSING DATE: 04 March 2026**

**CLOSING TIME: 23H55PM**

**Submission format (OneDrive)**

Name

 Bidder Name

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

## BID SUBMISSION LINK REQUESTS:

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

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

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

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

<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>	<b>YES</b>		<b>NO</b>	
<b>[TICK APPLICABLE BOX]</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  [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  [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> (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)				
<b>IF YES, WHO ISSUED THE CERTIFICATE?</b>				
<b>REGISTERED WITH THE NATIONAL TREASURY CSD</b>  [TICK APPLICABLE BOX]	<b>YES</b>		<b>NO</b>	
<b>CSD REGISTRATION NUMBER</b>				
<b>TAX COMPLIANCE STATUS PIN (TCS) NUMBER ISSUED BY SARS</b>				

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
<p>1.1. BIDS MUST BE SUBMITTED ELECTRONICALLY BY THE STIPULATED TIME TO THE LINK PROVIDED. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED)</b></p> <p>1.3. <b>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.</b></p> <p>1.4. <b>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.</b></p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<p>2.1 ALL BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS IN THEIR COUNTRY OF RESIDENCE.</p> <p>2.2 SOUTH AFRICAN BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 SOUTH AFRICAN BIDDERS CAN APPLY FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE <a href="http://WWW.SARS.GOV.ZA">WWW.SARS.GOV.ZA</a>.</p> <p>2.4 SA BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER (TAX COMPLIANCE) IN ACCORDANCE WITH APPLICABLE LEGISLATION IN THEIR COUNTRY OF RESIDENCE.</p> <p>2.6 WHERE SA BIDDERS HAVE NO TCS AVAILABLE BUT ARE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>
<p>3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p><b>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.</b></p>

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

## PART C

### CHECKLIST OF COMPULSORY RETURNABLE SCHEDULES AND DOCUMENTS

**Please adhere to the following instructions:**

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

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

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	One original Bid document in separate folders; Folder 1 - for Pre-Qualifying Criteria and Functional Evaluation and Folder 2 - Price / Financial Proposal – <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 D:</b> Certified copies of your CIPC company registration documents listing all members with percentages, in case of a close corporation.
<input type="checkbox"/>	<input type="checkbox"/>	<b>Annexure E:</b> Certified copies of latest share certificates, in case of a company.
<input type="checkbox"/>	<input type="checkbox"/>	<b>Annexure F: (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 G:</b> Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure H:</b> General Condition of Contract  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Annexure I:</b> CSD Tax Compliance Status and Registration Requirements Report                                   |

## PART D

### CONDITIONS OF TENDERING AND UNDERTAKINGS BY BIDDER

#### 1. DEFINITIONS

In this Request for Proposals, unless a contrary intention is apparent:

- 1.1 **B-BBEE** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act, 2003;
- 1.2 **B-BBEE Act** means the Broad-Based Black Economic Empowerment Act, 2003;
- 1.3 **B-BBEE status level of contributor** means the B-BBEE status received by a measured entity based on its overall performance used to claim points in terms of regulation 6 and 7 of the Preferential Procurement Regulations, 2022.
- 1.4 **Business Day** means a day which is not a Saturday, Sunday or public holiday in South Africa.
- 1.5 **Bid** means a written offer in the prescribed or stipulated form lodged by a Bidder in response to an invitation in this Request for Proposal, containing an offer to provide goods, works or services in accordance with the Specification as provided in this RFP.
- 1.6 **Bidder** means a person or legal entity, or an unincorporated group of persons or legal entities that submit a Bid.
- 1.7 **Companies Act** means the Companies Act, 2008.
- 1.8 **Compulsory Documents** means the list of compulsory schedules and documents set out in Part B.
- 1.9 **Closing Time** for the OneDrive Link submissions – 16h00 on the 26 August 2024 (Telkom Time)
- 1.10 **DBSA** means the Development Bank of Southern Africa Limited.
- 1.11 **DFI** means Development Finance Institution.
- 1.12 **Evaluation Criteria** means the criteria set out under the clause 26 (Evaluation Process) of this Part C, which includes the Qualifying Criteria, Functional Criteria and Price and Preferential Points Assessment (where applicable).
- 1.13 **Functional Criteria** means the criteria set out in clause 27 of this Part C.
- 1.14 **Intellectual Property Rights** includes copyright and neighbouring rights, and all proprietary rights in relation to inventions (including patents) registered and unregistered trademarks (including service marks), registered designs, confidential information (including trade secrets and know how) and circuit layouts, and all other proprietary rights resulting from intellectual activity in the industrial, scientific, literary or artistic fields.
- 1.15 **PFMA** means the Public Finance Management Act, 1999.
- 1.16 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000.
- 1.17 **PPPFA Regulations** means the Preferential Procurement Regulations, 2022 published in terms of the PPPFA.

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

No questions will be answered telephonically.

#### 4. SUBMISSION OF TENDERS

COMPULSORY BRIEFING: 20 February 2026- Tender briefing will be done online via Microsoft teams.

LINK: [Compulsory Briefing Meeting Link](#)

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

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

**Tender Submission Deadline:**

CLOSING DATE: 04 March 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 [tumim@dbsa.org](mailto:tumim@dbsa.org)
- 11.3 Any communication by a Bidder to the DBSA will be effective upon receipt by the Tender Officer (provided such communication is in the required format).
- 11.4 The DBSA has restricted the period during which it will accept questions or requests for further information or clarification and reserves the right not to respond to any enquiry or request, irrespective of when such enquiry or request is received.
- 11.5 Except where the DBSA is of the opinion that issues raised apply only to an individual Bidder, questions submitted and answers provided will be made available to all Bidders by e-mail, as well as on the DBSA's website without identifying the person or organisation which submitted the question.
- 11.6 In all other instances, the DBSA may directly provide any written notification or response to a Bidder by email to the address of the Bidder (as notified by the Bidder to the Tender Manager).
- 11.7 A Bidder may, by notifying the Tender Officer in writing, withdraw a question submitted in accordance with clause 12, in circumstances where the Bidder does not wish the DBSA to publish its response to the question to all Bidders.

## **12. UNAUTHORISED COMMUNICATIONS**

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

## **13. IMPROPER ASSISTANCE, FRAUD AND CORRUPTION**

- 13.1 Bidders may not seek or obtain the assistance of employees of the DBSA in the preparation of their tender responses.

- 13.2 The DBSA may in its absolute discretion, immediately disqualify a Bidder that it believes has sought or obtained such improper assistance.
- 13.3 Bidders are to be familiar with the implications of contravening the Prevention and Combating of Corrupt Activities Act, 2004 and any other relevant legislation.

#### **14. ANTI-COMPETITIVE CONDUCT**

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

#### **15. COMPLAINTS ABOUT THE TENDERING PROCESS**

- 15.1 Any complaint about the RFP or the Tendering Process must be submitted to the Supply Chain Management Unit in writing, by email, immediately upon the cause of the complaint arising or becoming known to the Bidder, ([tenders@dbsa.org](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 affect the fairness of the Tendering Process.

## **21. OBLIGATION TO NOTIFY ERRORS**

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

## **22. RESPONSIBILITY FOR BIDDING COSTS**

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

## **23. DISCLOSURE OF BID CONTENTS AND BID INFORMATION**

- 23.1 All Bids received by the DBSA will be treated as confidential. The DBSA will not disclose contents of any Bid and Bid information, except:
- 23.1.1 as required by law;
  - 23.1.2 for the purpose of investigations by other government authorities having relevant jurisdiction;

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

## 24. USE OF BIDS

- 24.1 Upon submission in accordance with the requirements relating to the submission of Bids, all Bids submitted become the property of the DBSA. Bidders will retain all ownership rights of any intellectual property contained in the Bids.
- 24.2 Each Bidder, by submission of their Bid, is deemed to have licensed the DBSA to reproduce the whole, or any portion, of their Bid for the sole purposes of enabling the DBSA to evaluate the Bid.

## 25. BID ACCEPTANCE

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

## 26. EVALUATION PROCESS

- 26.1 The Bids will be evaluated and adjudicated as follows:

### 26.1.1 First Stage – Test for administrative Responsiveness

The test for administrative responsiveness will include the following:

### Stage 1: Responsiveness

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

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

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

- 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)
<b>1</b>	Standard conditions of tender as required.	48hours	Y
<b>2</b>	Returnable documents completed and signed.	48hours	Y
<b>3</b>	Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be registered to do business with the DBSA.	48 hours	Y
<b>4</b>	A Tax Pin issued by SARS.	48hours	Y

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

#### 26.1.2 **Second Stage –Technical/Functional criteria**

Only those Bidders who meet the minimum score (70) or above out of 100 of the technical requirements will proceed to pricing evaluation (third Stage). Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable. Bidders will be assessed on the functionality criteria (Second Stage) as set out in this RFP.

#### 26.1.3 **Third Stage – price**

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

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

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

## **27. Risk Analysis and Objective Criteria**

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

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

- i. Any bidder that has a cumulative order book totalling 3 Awards with outstanding value, **may be excluded from further evaluation.**
- ii. Where a bidder has 3 active Awards with an outstanding value and the outstanding value is 10% or less, indicating the project is nearing completion, the bidder may be included **for further evaluation and/or recommendation for award.**
- iii. Where a bidder has 3 active Awards with an outstanding value and at least one of the projects has stalled for a period of 6 months or more, or the client has placed the project on hold indefinitely, the bidder may be included **for further evaluation and/or recommendation for award.**
- iv. The DBSA has the discretion to apply an objective criterion.

## **28. Due Diligence**

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

### **a. Judgements and criminal convictions**

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

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

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

### **c. Performance**

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

### **d. Reputational harm**

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

### **e. Restricted/Blacklisted**

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

f. **Vetting**

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

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

- a. Financial stability of the bidder based on key ratio analysis ;
- b. Efficiency;
- c. Profitability;
- d. Financial Risk;
- e. Liquidity;
- f. Acid Test;
- g. Solvency; and
- h. Commercial relationship with a politically exposed and brand risk.

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

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

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

### **30. STATUS OF BID**

- 30.1 Each Bid constitutes an irrevocable offer by the Bidder to the DBSA to provide the Services required and otherwise to satisfy the requirements of the Specification as set out in this RFP.
- 30.2 A Bid must not be conditional on:
- 30.2.1 the Board approval of the Bidder or any related governing body of the Bidder being obtained.
  - 30.2.2 the Bidder conducting due diligence or any other form of enquiry or investigation.
  - 30.2.3 the Bidder (or any other party) obtaining any regulatory approval or consent.
  - 30.2.4 the Bidder obtaining the consent or approval of any third party; or
  - 30.2.5 the Bidder stating that it wishes to discuss or negotiate any commercial terms of the contract.
- 30.3 The DBSA may, in its absolute discretion, disregard any Bid that is, or is stated to be, subject to any one or more of the conditions detailed above (or any other relevant conditions).
- 30.4 The DBSA reserves the right to accept a Bid in part or in whole or to negotiate with a Bidder in accordance with the provisions of this RFP and the applicable laws and regulations.

### **31. CLARIFICATION OF BIDS**

- 31.1 The DBSA may seek clarification from and enter into discussions with any or all of the Bidders in relation to their Bid. The DBSA may use the information obtained when clarification is sought or discussions are held in interpreting the Bid and evaluating the cost and risk of accepting the Bid. Failure to supply clarification to the satisfaction of the DBSA may render the Bid liable to disqualification.
- 31.2 The DBSA is under no obligation to seek clarification of anything in a Bid and reserves the right to disregard any clarification that the DBSA considers to be unsolicited or otherwise impermissible or irrelevant in accordance with the rules set out in this RFP.

### **32. DISCUSSION WITH BIDDERS**

- 32.1 The DBSA may elect to engage in detailed discussions with any one or more Bidder(s), with a view to maximising the benefits of this RFP as measured against the evaluation criteria and in fully understanding a Bidder's offer.
- 32.2 Where applicable, the DBSA will invite Bidders to give a presentation to the DBSA in relation to their submissions.
- 32.3 The DBSA is under no obligation to undertake discussions with, and Bidders.
- 32.4 In addition to presentations and discussions, the DBSA may request some or all Bidders to:
- 32.4.1 conduct a site visit, if applicable.
  - 32.4.2 provide references or additional information; and/or

32.4.3 make themselves available for panel interviews.

### **33. SUCCESSFUL BIDS**

- 33.1 Selection as a successful Bidder does not give rise to a contract (express or implied) between the successful Bidder and the DBSA for the supply of the Services. No legal relationship will exist between the DBSA and a successful Bidder for the supply of the Services until such time as a binding contract is executed by them.
- 33.2 The DBSA may, in its absolute discretion, decide not to enter into pre-contractual negotiations with a successful Bidder.
- 33.3 A Bidder is bound by its Bid and all other documents forming part of the Bidder's Response and, if selected as a successful Bidder, must enter into a contract on the basis of the Bid with or without further negotiation.

### **34. NO OBLIGATION TO ENTER INTO CONTRACT**

- 34.1 The DBSA is under no obligation to appoint a successful Bidder or Bidders (as the case may be), or to enter into a contract with a successful Bidder or any other person, if it is unable to identify a Bid that complies in all relevant respects with the requirements of the DBSA, or if due to changed circumstances, there is no longer a need for the Services requested, or if funds are no longer available to cover the total envisaged expenditure. For the avoidance of any doubt, in these circumstances the DBSA will be free to proceed via any alternative process.
- 34.2 The DBSA may conduct a debriefing session for all Bidders (successful and unsuccessful). Attendance at such debriefing session is optional.

### **35. BIDDER WARRANTIES**

- 35.1 By submitting a Bid, a Bidder warrants that:
- 35.1.1 it did not rely on any express or implied statement, warranty or representation, whether oral, written, or otherwise made by or on behalf of the DBSA, its officers, employees, or advisers other than any statement, warranty or representation expressly contained in the RFP;
  - 35.1.2 it did not use the improper assistance of DBSA employees or information unlawfully obtained from them in compiling its Bid;
  - 35.1.3 it is responsible for all costs and expenses related to the preparation and lodgement of its Bid, any subsequent negotiation, and any future process connected with or relating to the Tendering Process;
  - 35.1.4 it accepts and will comply with the terms set out in this RFP; and
  - 35.1.5 it will provide additional information in a timely manner as requested by the DBSA to clarify any matters contained in the Bid.



### **36. DBSA'S RIGHTS**

- 36.1 Notwithstanding anything else in this RFP, and without limiting its rights at law or otherwise, the DBSA reserves the right, in its absolute discretion at any time, to:
- 36.1.1 cease to
  - 36.1.2 in the Tendering Process.
  - 36.1.3 require additional information or clarification from any Bidder or any other person;
  - 36.1.4 provide additional information or clarification.
  - 36.1.5 negotiate with any one or more Bidder;
  - 36.1.6 call for a new Bid.
  - 36.1.7 reject any Bid received after the Closing Time; or
  - 36.1.8 reject any Bid that does not comply with the requirements of this RFP.

### **37. GOVERNING LAWS**

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

## **PART E**

### **TERMS OF REFERENCE (TOR)**

**APPOINTMENT OF A SERVICE PROVIDER TO  
CONSOLIDATE, REVIEW, EDIT, AND PUBLISH OUTPUTS  
FROM THE ANNUAL RESEARCH COLLOQUIUM INTO THE  
DBSA ANNUAL INFRASTRUCTURE DEVELOPMENT  
COLLOQUIUM BOOK FOR A PERIOD OF THREE (03) YEARS**

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## 1. CONTEXT

The DBSA Annual Research Colloquium serves as a cornerstone for strengthening thought leadership in infrastructure development and related activities. Insights and research generated through the platform are consolidated and published in the DBSA Colloquium Book, providing an avenue for dissemination that benefits South Africa, the SADC region, and the broader continent. In this way, the publication amplifies the impact of the colloquium and supports the Bank's thought leadership strategy. The DBSA will be hosting its 4th Annual Research Colloquium on **Tuesday, 17 March 2026** in Midrand. This colloquium will explore how infrastructure resilience can support economic recovery, social equity, and climate adaptation. Stakeholders, including policymakers, researchers, and industry leaders, will examine innovative financing models, smart technologies, and governance frameworks that enable infrastructure to withstand shocks while fostering inclusive growth. The colloquium will be held under the theme ***"Building Resilient Infrastructure for Socioeconomic Transformation in Emerging Economies"*** as a daylong event. It will consider submissions that fall in one or more of the following sub-themes:

- Climate-Resilient Infrastructure Development
- Digital Infrastructure as a Catalyst for Inclusive Growth
- Public-Private Partnerships for Sustainable Infrastructure
- Inclusive & Social Infrastructure
- Infrastructure Governance and Institutional Capacity Building
- Urbanization, Smart Cities, and Sustainable Mobility
- Green Infrastructure Solutions for Resource-Constrained Economies
- Infrastructure for Regional Integration

## 2. PURPOSE

A notable gap exists in authoritative publications that systematically analyse and document infrastructure research trends across the region. The Annual Research Colloquium addresses this by generating impactful research outputs, which are consolidated and disseminated through the Colloquium Book. The publication provides a credible platform that benefits South Africa, the SADC region, and the broader continent, while serving as a strategic tool for advancing knowledge management in line with the Bank's thought leadership agenda. As a leading institution in development finance, the DBSA uses this platform to attract innovative ideas and promote high-quality, relevant scholarship that supports its strategic objectives.

The purpose of this Terms of Reference is to appoint a qualified service provider to consolidate, review, edit, and publish the outputs from the annual research colloquium, and compile them into the DBSA Colloquium Book.

### **3. DETAILED SCOPE OF WORK**

The appointed service provider will be responsible for consolidating, reviewing, editing, and compiling the colloquium research papers into the DBSA Colloquium Book. In addition, they will secure and maintain an open-access platform for the publication and oversee its complete editorial and publishing management. The assignment will encompass the full publishing cycle from editorial planning and peer review management to editing, design, production, dissemination, and performance monitoring, to ensure the journal achieves the highest academic and publishing standards.

- **Oversee the mission and scope of the publication in consultation with a publisher**
  - Ensures alignment between the scope of the publication and the articles published
- **Responsible for overseeing the editorial review process**
  - Manage the call for papers process including coordination with authors and thematic alignment
  - Complete the initial screening of abstracts submitted by authors through the Strategy, Economics & Sustainability Division's Editorial Committee in preparation for the Colloquium scheduled for March 17, 2026
  - Facilitate the secondary screening of all accepted papers submitted for presentation at the Colloquium
  - Ensure that the review process is both timely and protects the image of the publication in respect of due feedback to authors
  - Administer the sending out of papers to designated reviewers for peer review in a manner ensuring alignment between the diverse topics and areas of speciality of the reviewers
  - Recommend and maintain an Editorial Board and Peer Review Committee ensuring diversity of expertise.
  - Ensure a double-blind review process where names of reviewers and authors are not revealed to each other
  - Provide a quote on the rate per paper for all accepted papers submitted for presentation at the Colloquium

- Ensure that the review process is both timely and protects the image of the publication in respect of due feedback to authors
- Draft and finalise the editorial for each issue reflecting key research insights relevant to DBSA.
- **Provides the manuscript accepted for the publication to the publisher**
  - Develop an annual publishing plan and editorial calendar aligned with DBSA's Knowledge Management and Research (KMR) agenda.
  - Forward accepted manuscripts for the publication to the publisher and ensures that they conform to quality specifications, are complete and on schedule
- **Ensures that the publication follows customary ethical policies for scholarly publishing**
  - Ensure that publication processes in respect of the entire value chain adheres to the highest standards of ethical conduct and any breaches hereto will be duly followed up.
  - Ensure that all authors are provided with equitable and fair access, maintaining the highest standards of fairness throughout the process.
  - Coordinate revision and acceptance of manuscripts in line with reviewer feedback.
- **Identifies opportunities to promote the publication**
  - Capitalize on any speaking engagements and opportunities to publicise the publication and its scope of coverage and encourage authors to contribute to it.
  - Be vigilant and identify relevant events where promotional material on the publication can be sent for promotional purposes.
- **Provides the publisher with appropriate information about editorial activities of the publication**
  - Identify risks and inhibiting factors (e.g., submission delays, reviewer capacity) and propose mitigation measures.

In addition to the above, the Service Provider will provide high quality editing and proofreading services to the publication including categories for developmental/substantive editing, copy editing, light copy editing, proof reading and open-source publication, including the following categories:

***Category A: Developmental/Substantive Editing***

- Consider the publication's concept and intended use, content, organization, design, and style.
- Make the document functional for its readers, not just to make it correct and consistent.
- Examine the overall structure and help with the organisation of the content.

- Assist authors fill in blanks and eliminate repetitions and they may suggest that the chapters or paragraphs be rearranged.
- Focus not only on grammar and spelling but also on supporting authors in producing clear, coherent writing tailored to the intended audience.
- Make changes using the 'track changes' function on MS Word which renders them visible.

### **Category B: Copy Editing**

- Perform substantive language editing which aims at improving the overall coverage and presentation of the product, its content, scope, length, level, and organization. The service provider may also suggest improvements for the author(s) to make or may (by agreement with the author(s)) rewrite and rearrange the material. The DBSA Knowledge Management Specialist in charge of coordinating the publication will support the coordination with the authors and getting approvals on edited texts.
- Perform detailed editing to ensure each section conveys the author's intended meaning clearly, without gaps or contradictions. This includes reviewing sentence structure, word choice, use of abbreviations, verifying data in tables against the text, and checking text alignment with illustrations and captions.
- Integrate chapters and individual contributions into a cohesive and consistent book, ensuring smooth transitions and editing to eliminate repetition where applicable.
- Ensure consistency by applying the DBSA Style Guide for spelling and language style. Verify the numbering of illustrations, tables, and notes, along with all cross-references, and confirm the accuracy and consistency of bibliographic references.
- Look out for legal problems such as copyright, plagiarism, and libel.
- Checking quotations or illustrations that may need permission from the copyright owner
- Create, where applicable, the list of acronyms and the table of contents, and provide guidelines for the indexer as needed.
- Ensure clear presentation and format of the material for the typesetter/designer making sure that the material is complete and that all the parts are clearly identified. The document should be formatted in accordance with the DBSA's Word template.
- Make changes using the 'track changes' function on MS Word which renders them visible.

### **Category C: Light Copy Editing**

- Carry out a thorough check for consistency especially in terms of spelling, style, and headers.
- Ensure a clear presentation and format of the material for the typesetter/designer. The document should be formatted in accordance with the DBSA's Word template.
- Check the spelling and grammar, font sizes and fonts, bullet listings and spaces.
- Check all numbering, paragraphs, headings, sub-headings, to make sure they correspond to the table of contents.

- Check footnotes and endnotes.
- Check that the heading structure is clear and logical.
- Check the title pages, the cover, and the copyright page carefully, verifying consistency in titles, photos/artwork, copyright, etc.
- Make changes using the 'track changes' function on MS Word which renders them visible.

#### **Category D: Proofreading**

- Carry out a final and thorough check for consistency especially in terms of spelling, style, and headings.
- Check spelling and grammar, font sizes and fonts, bullet listings and spaces.
- Make sure that no text has disappeared or was cut out accidentally during layout.
- Check all numbering, paragraphs, heading, sub-headings, to make sure they correspond to the table of contents.
- Check the pagination of the publication to make sure that it corresponds to the table of contents and index (if such exists).
- Check for 'orphans' and 'widows/widowers' (that is when a word or part of a sentence is left on its own at the bottom/top of a page with the continuation on the next/previous page); and
- Check the title pages, the cover, and the copyright page carefully, verifying consistency in titles, photos/artwork, copyright, etc.
- Deliver the PDF file with each comment and edit visible using the 'Comment and Mark-Up Tool' in Adobe Acrobat.

#### **Category E: Design, Layout, and Production**

- Ensure adherence to the DBSA Corporate Identity and Branding Guidelines.
- Prepare high-resolution PDF and source files suitable for printing and dissemination.
- Manage print production and logistics ensuring quality control.
- Incorporate DBSA-provided visual elements and secure permissions for any third-party content.
- Open Access Publishing and Digital Dissemination
  - Secure and maintain a reliable open-access platform to host the Colloquium Book.
  - Ensure all articles are freely accessible online and optimised for discoverability.
  - Manage DOI registration and metadata submission for all published articles.
  - Support indexing and accreditation processes (e.g., DOAJ, DHET).
  - Ensure compliance with open access, copyright, and data protection policies.
  - Implement analytics tools to measure readership, downloads, and citations.

- Provide periodic reports on journal performance and engagement.
- **Capacity Building and Knowledge Transfer**
  - Conduct capacity-building workshops for DBSA staff and contributors on writing and publishing.
  - Develop guidelines and templates for authors and reviewers.
  - Provide handover documentation and training to DBSA staff to ensure sustainability.
- **Quality Assurance and Ethical Compliance**
  - Uphold international publishing ethics in line with Committee of Public Ethics (COPE) guidelines.
  - Implement plagiarism screening using recognised tools (e.g., Ithenticate).
  - Maintain transparent documentation of peer review decisions and editorial correspondence.
  - Ensure equitable treatment of authors and reviewers, avoiding bias or conflict of interest.
  - Establish a quality control checklist for editing, review, and publication milestones.
- **Monitoring, Evaluation, and Reporting**
  - Develop an M&E framework with KPIs such as timeliness, quality, satisfaction, and visibility.
  - Submit quarterly progress reports and an annual performance summary.
  - Participate in review meetings with DBSA to discuss progress, challenges, and improvements.
- **Deliverables and Outputs**
  - Annual publishing plan and editorial calendar.
  - Managed call for papers and peer review documentation.
  - Edited and peer-reviewed manuscripts for each issue.
  - Final designed and formatted journal (print and digital).
  - Open access hosting and DOI-registered content.
  - Quarterly progress reports and annual impact summary.
  - Capacity-building materials and handover documentation



#### 4. REQUIRED EXPERTISE

The assignment requires an understanding of economics, the development finance and infrastructure development sector of South Africa and the rest of the continent, report writing as well as editing skills. Accordingly, the key expertise required to successfully prepare the report *inter alia* are:

##### a) Qualifications and Experience of a Bidding Company

- i. Post-graduate degree in development studies, finance, economics, or other related fields
- ii. Minimum of Seven (07) years of journal/book publishing experience
- iii. Knowledge and publication record on development issues in Africa
- iv. Previous experience in journal or book involvement and editing would be highly recommended
- v. Consummate management skills

##### b) Competencies

###### *Technical*

- i. Good comprehension of the journal/book development and dissemination process
- ii. Well-developed integrity, discretion, and honesty
- iii. Competent verbal and written communication skills for the compilation of communiques that may be relevant and/or necessary from time to time
- iv. Collaboration and creating effective relationships
- v. Ability to establish and maintain harmonious working relationships with co-workers, staff, and external contacts, and to work effectively in a professional team environment
- vi. Competent knowledge of the Bank relevant sectors as well as critical information for research purposes
- vii. Solid knowledge of the areas of development, economics, and infrastructure

###### *Behavioural*

- i. Having sustained energy and determination in the face of obstacles to set and meet challenging targets in compliance with time, quality, and diversity standards and delivering the required business results
- ii. The ability to adapt to and work with a variety of situations, individuals, and groups
- iii. Working co-operatively across cultures and organizational boundaries to achieve shared goals
- iv. Understanding of own emotions and 'triggers' and how they impact on own behaviour and/or the behaviour of others. It is also about understanding own strengths and limitations
- v. The willingness and ability to give priority to stakeholders and delivering high quality services which meet their needs

- vi. Ability to follow and see things through and be results oriented

### **c) References**

Bidder to provide at least three reference letters for book and/or journal publishing projects, locally or internationally.

## **5. TIME FRAMES AND DURATION**

It is anticipated that this assignment will be for a duration of up to **36 months** from the date of engagement. Upon successful appointment, the Service Provider will be expected to engage with the project sponsor to refine their project plan, deliverables, and key milestones. The services should be initiated in at least one week after signing the acceptance letter.

## **6. MANAGEMENT AND REPORTING**

The successful Professional Service Provider (PSP) shall report to the Project Manager(s) on an ongoing basis and work in close collaboration with any internal clients deemed vital for the successful completion of the assignment (e.g., GE: SES, EKMR Unit). The Project Manager(s) will review and oversee the completion of this assignment. It is further envisaged that the payment schedule will be aligned to the milestone achievements and will be paid in accordance with the DBSA's framework order payment process.

## **7. TECHNICAL EVALUATION OF PROPOSAL**

The Bid Evaluation Committee coordinated by the DBSA will evaluate submissions based on the following criteria:

**\*\*\*The threshold of the functionality evaluation criteria is 70 points, however, in addition, the bidder is also required to achieve a minimum score of 15 points for the Planning/Methodology and Approach section to meet the evaluation criteria threshold.**

Description	Evidence	Scoring guidelines	Weighting
<p><b>Planning/Methodology and approach</b></p> <p>The Bidder must provide a comprehensive, project-specific plan demonstrating a deep understanding of:</p> <p>a) Research in the South African and African economics, development finance and infrastructure development landscape.</p> <p>b) The process of developing, reviewing, editing and publishing of academic journals/papers.</p>	<p>a) Detailed project-specific methodology document demonstrating a deep understanding of Research in the South African and African economics, development finance and infrastructure development landscape.</p> <p>b) Signed and dated 5-page (minimum) approach plan comprising of an end-to-end delivery plan from Call for Papers to published book, linked to prior experience, including peer-review, editorial governance, production, and timelines</p> <p>c) Demonstrate a high level of expertise and subject matter knowledge in crafting research</p>	<p>Excellent: Comprehensive, DBSA-specific plan addressing all requirements under (a) to (d), clearly supported by demonstrated relevant experience and realistic, evidence-based timelines = <b>20 points</b></p> <p>Good: Sound plan addressing all requirements under (a) to (d) with experience referenced, but with minor gaps in tailoring, evidence, or depth = <b>15 points</b></p> <p>Fair: Plan addressing some of the requirements but missing one or two elements from (a) to (d) = <b>5 points</b></p> <p>Insufficient: Largely generic or high-level plan with limited linkage to demonstrated experience and insufficient project-specific details and or No plan submitted, or materially incomplete submission failing to address mandatory requirements = <b>0 points</b></p> <p><b><u>Minimum Score for this is 15 points</u></b></p>	20

Description	Evidence	Scoring guidelines	Weighting
	<p>themes customising to the requirements of the DBSA.</p> <p>d) Project implementation and timelines.</p>		
<p><b>Bidding Company References</b></p> <p>The Bidder must provide at least three (3) references for book and/or journal publishing projects, locally or internationally.</p>	<p>Reference letters on official company letterhead should have the following information:</p> <ul style="list-style-type: none"> <li>• Name of the client serviced</li> <li>• Name of service provider/bidder</li> <li>• Description of services rendered</li> <li>• Contactable reference name and contact details</li> <li>• Signature of a duly authorised person or their representative</li> </ul>	<p>Excellent: Three (3) or more relevant references provided, with strong relevance to policy reform, infrastructure or development finance publishing = <b>20 points</b></p> <p>Good: Two (2) relevant references provided = <b>15points</b></p> <p>Fair: One (1) relevant reference provided = <b>5 points</b></p> <p>Insufficient: No relevant references provided = <b>0 points</b></p>	20
<p><b>Service Provider Experience</b></p> <p>Company experience of 7 years' experience and evidence of previously completed projects.</p>	<p>a) The service provider must demonstrate their experience and rigorous approach to book/journal publishing</p>	<p>Excellent: Seven+ (7) years or more relevant experience in book/journal publishing, with strong evidence of completed projects = <b>20 points</b></p>	20

Description	Evidence	Scoring guidelines	Weighting
	b) The service provider must provide company profile, with information containing but not limited to experience and number of years in book/journal publishing and include a list of completed projects	<p>Good: Six (6) to six (7) years relevant experience = <b>15 points</b></p> <p>Fair: Three (3) to four (4) years relevant experience = <b>10 points</b></p> <p>Insufficient: Less than three (3) years relevant experience = <b>0 points</b></p>	
<p><b>Examples</b></p> <p>Bidders must provide examples of work published previously which covers the infrastructure environment or similar.</p>	a) Bidder to provide at least three (3) examples of previously published actual articles, and/or books, journals, and/or reports in infrastructure development. <b>Attach as (Appendix A)</b>	<p>Excellent: Three (3) examples and more = <b>10 points</b></p> <p>Good: two (2) examples = <b>5 points</b></p> <p>Fair: one (1) example = <b>2 points</b></p> <p>Insufficient: no examples = <b>0 points</b></p>	10
<p><b>Qualifications and experience of Main Editor (Project Lead)</b></p> <p>a) The Bidder must provide the Curriculum Vitae and certified copies of qualifications of the proposed Main Editor.</p>	<ul style="list-style-type: none"> <li>• CV of Main Editor</li> <li>• Proof of Qualification certificates to be attached</li> <li>• Project organogram</li> </ul>	<p>Excellent: Master's degree or higher in a relevant field with demonstrated relevant ten (10) years editorial experience = <b>20 points</b></p>	20

Description	Evidence	Scoring guidelines	Weighting
<p>b) The service provider's assigned project leader/main Editor must be clearly identified and must have extensive and relevant qualifications and experience.</p> <p>c) The project leader must have at least a Master's degree in one of the following fields: business, engineering and/or finance related to infrastructure investment, along with a master's qualification in a relevant field including Engineering, Economics, Finance, Business Administration/Leadership, Social Sciences, Development Studies, Sustainable Development or Development Finance.</p>		<p>Good: Honours degree in a relevant field with six to seven (7 – 9) years' experience = <b>15 points</b></p> <p><b>Fair: Degree in a relevant field with 4 – 6 years experience = 5 points</b></p> <p>Insufficient: Basic degree or lower, or no evidence provided = <b>0 points</b></p>	
<p><b>Qualifications and experience of Project Team</b></p> <p>Bidder to provide an organogram and brief profiles of the supporting team (at least 2) for this project. Kindly note this is compulsory.</p>	<ul style="list-style-type: none"> <li>The service provider's project team (excluding the project leader) must be clearly identified and must have extensive and relevant qualifications and skills in the fields of Engineering,</li> </ul>	<p>Excellent: Minimum Master's Degree and relevant experience exceeding five (5) years = <b>10 points</b></p> <p>Good: Minimum Honours Degree and relevant experience of between three and four (3 – 4) years = <b>5 points</b></p>	10

Description	Evidence	Scoring guidelines	Weighting
	<p>Economics, Finance, Business Administration/Leadership, Social Sciences, Development Studies, Sustainable Development or Development Finance, and ideally each have 5 years' experience in related projects.</p> <ul style="list-style-type: none"> <li>The service provider must submit a comprehensive CV of each of the project team members providing information on their qualifications (certificates to be attached), relevant work experience and key competencies.</li> </ul>	<p>Insufficient: Degree and relevant experience not exceeding two (2) years = <b>0 points</b></p>	
<b>Total</b>			<b>100</b>
<b>Threshold</b>			<b>70</b>

Bidders who fail to obtain 70 points or above will not be evaluated further for Price and Specific Goals.  
The threshold below will be used to evaluate price and preference points:

AREA	MAXIMUM POINTS
Price	80
Specific Goals	20
Total	100



## 8. PRICING SCHEDULE

Stage	Key Deliverable as Per Scope of Work	Expert Description	Expected Outcome(s)	Number of Hours / Days	Rate Exclusive of VAT	CPI %	Total Exclusive of VAT
1.	Planning	Briefing/planning meetings with the appointed Editor, KMR Unit, Office of the Chief Economist, and other internal stakeholders	Project plan for project execution				
2.	Administration	Manage the review process of the submitted abstracts and communicate outcomes to the authors. Manage the timeliness of publication review process, including administrative duties, submission, and release of files, ensure the timely publication of all articles and issues in accordance with scheduling deadlines and KPIs, monitor the process of the volume of publication papers, and consolidate edits, perform instant quality checks	Project schedules with timelines stipulated				
3.	Editing	Maintain and develop the publication's profile and reputation, editing and proofreading the publication's final content, oversee peer review and ensure continuous delivery of the journal	Edited, proof-read and peer-reviewed draft (including copy-editing, formatting, proof-reading)				

4.	Draft DBSA Journal	Detailed DBSA journal that gives insights into the research papers presented at the Research Colloquium or that will be published in additional issues of DAJID.	To outline the research outputs of the papers that will be published in the Colloquium Journal to contribute to the DBSA’s business intelligence and thought leadership imperatives				
5.	Final DBSA Journal	DBSA Journal including research outputs and recommendations for the DBSA on critical areas to be pursued in future	Consolidated first edition of the Annual Research Colloquium Journal				
6.	Publishing	Ensure that the Journal is published through a suitable Open Access publishing platform	Open Access publishing platform for the Colloquium Journal				
7.	Disbursements						
3 YEAR SUB- TOTAL EXCLUDING VAT							
15% VAT							
3 YEAR_TOTAL CONTRACT COST INCLUDING VAT							

## **9. RESERVATIONS**

The DBSA expressly reserves the following rights:

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

## **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 directly related to or derived from the work carried out through this contract.

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

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

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

### 2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state? **YES/NO**
- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

## **SBD 4**

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

2.2.1 If so, furnish particulars:

.....  
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any

interest in any other related enterprise whether or not they are bidding for this contract?  
**YES/NO**

2.3.1 If so, furnish particulars:

.....  
.....

## **3 DECLARATION**

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

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

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

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

3.4 In addition, there have been no consultations, communications, agreements or arrangements with  
any competitor regarding the quality, quantity, specifications, prices, including methods, factors or  
formulas used to calculate prices, market allocation, the intention or decision to submit or not to

submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

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

#### **SBD 4**

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

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

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

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

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

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

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

### 1. GENERAL CONDITIONS

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

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

### 1.2 To be completed by the organ of state

*(delete whichever is not applicable for this tender).*

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

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

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

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
PREFERENCE POINTS	20
<b>Total points for Price and Preference</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 PREFERENCE POINT SYSTEMS

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

**80/20**

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

Where

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

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



### 3.2.1. POINTS AWARDED FOR PRICE

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

**80/20**

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

## 4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

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

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

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

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

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

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

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

#### DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in

paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

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

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

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

SURNAME AND NAME: .....

DATE:.....

ADDRESS:.....

.....

.....

.....

## RESTRICTED SUPPLIERS

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

Item	Question	Yes	No
------	----------	-----	----

4.1	<p><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>          (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 <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p><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 <input type="checkbox"/>	No <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 <input type="checkbox"/>	No <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 <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

## **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**

**Bidders are required, as annexure E 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 F, 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 G 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:

Item	YES	NO
Is the Bidder familiar with the General Conditions of Contract prescribed by the National Treasury?		

### **Tax Compliant Status and CSD Registration Requirements**

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

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

**CSD Registration Number:**



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

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