

# **Request for Information (RFI)**

# Identifying Specialist Service Providers capable of Defining Requirements and Evaluation Criteria for the Selection of, or Enhancement of an Enterprise Resource Planning (ERP) Solution

| Date of Issue                            | Wednesday, 27 March 2024  |  |
|--|---|--|
| Non-compulsory<br>briefing session       | Date: Thursday, 04 April 2024<br>Time: 13:00 – 14:30<br>Link: Join on your computer, mobile app or room device<br><u>Click here to join the meeting</u><br>Meeting ID: 331 229 477 271<br>Passcode: QZSuTp<br><u>Download Teams</u>   Join on the web |  |
| Closing date for<br>enquiries            | Thursday, 11 April 2024   |  |
| RFI Closing Date                         | Friday, 19 April 2024 @ 16:30   |  |
| Place for submission<br>of RFI proposals | Online only submission at <u>tender@csir.co.za</u><br>If the size of the documents exceeds 25MB, respondents must<br>send multiple emails. Use the RFI number and description as the<br>subject on the email.   |  |
| Enquiries                                | Strategic Procurement Unit E-mail: tender@csir.co.za  |  |
| Category                                 | ICT Services  |  |

# RFI No. 7039/19/04/2024

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## Glossary

| Abbreviation | Term  | Description   |
|--------------|---|---|
| CSIR         | Council for Scientific and<br>Industrial Research | A statutory body established in terms of<br>Scientific Research Council Act 46 of<br>1988, as amended.  |
| ERP          | Enterprise Resource<br>Planning                   | Software that organizations use to<br>manage day-to-day business activities<br>and integrate important parts of their<br>business.  |
| GDPR         | General Data Protection<br>Regulation             | A regulation in EU law on data protection<br>and privacy in the European Union and<br>the European Economic Area. The GDPR<br>aims to give individuals control over their<br>personal data and to simplify the<br>regulatory environment for international<br>business by unifying the regulation within<br>the EU. |
| ICT          | Information and<br>Communication Technology       | The use of computing and<br>telecommunication technologies, systems<br>and tools to facilitate the way information<br>is created, collected, processed,<br>transmitted and stored.  |
| RFI          | Request for Information                           | A process for gathering information from potential suppliers of a product or service.   |
| RFP          | Request for Proposal                              | A request for proposal (RFP) is a<br>business document that announces a<br>project, describes it, and solicits bids from<br>qualified bidders to complete it.   |

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| Abbreviation | Term                  | Description   |
|--------------|-----------------------|---|
| SO           | Strategic Objective/s | Broad and clearly defined statements of<br>'end goals' that an CSIR aspires to<br>achieve within a defined timeframe. |

# Definitions

| Independent Service | An Independent Service Provider refers to a company or          |
|---------------------|---|
| Provider            | individual that offers consulting services without bias towards |
|                     | specific solutions or products. The focus should be on          |
|                     | providing objective guidance and assistance in defining         |
|                     | requirements and evaluation criteria for selecting or enhancing |
|                     | an ERP (Enterprise Resource Planning) Solution, regardless      |
|                     | of any affiliations or partnerships with particular vendors.    |

## **1 INTRODUCTION**

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

One of the few constants in the over 75-year history of the CSIR is the awareness of, and commitment to, the value that science and technology can deliver to the development of our country.

The CSIR has an annual turnover in excess of R 2bn and ensures that the annual grant received from Parliament through the Department of Science and Innovation, which accounts for some 30% of its total income, is invested in knowledge generation, scientific infrastructure and enhancing skills. Additional income is generated from contract research for the public and private sectors, locally and abroad, as well as from royalties, licences and dividends from intellectual property management and commercial companies created by the CSIR.

Throughout the years, the organisation has demonstrated significant growth in its research output, transformation of over 2000 staff complement and added value to society.

## 2 BACKGROUND

The CSIR has been using the current Enterprise Resource Planning (ERP) environment for more than 20 years and plays a pivotal role in managing and streamlining CSIR's core business operations, encompassing a range of ERP capabilities as specified in paragraph 4.2 of this document.

The Information and Communication Technology (ICT) Services Centre is a vital support function within the CSIR, responsible to support the ERP environment playing a crucial role in facilitating the seamless operation of the ERP environment, among other essential services. Recognising the dynamic nature of technological advancements and the evolving landscape

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of organisational needs, ICT Services Centre realises the necessity for regular review and optimisation of the ERP environment.

The CSIR is embarking on a programme to review the CSIR's ERP environment, the programme may consist of various phases:

**Phase 1**: Request for Information (RFI) to **obtain information on cost estimates and timelines for consulting services** for defining requirements and evaluation criteria for the selection of, or enhancement of an ERP Solution. During this phase of the programme details of the CSIR's current ERP environment will not be shared.

**Phase 2**: Request for Proposal (RFP) or any other suitable procurement method to **appoint a service provider** to define requirements and evaluation criteria for the selection of, or enhancement of an ERP Solution.

#### Note:

- Phase one (1) and two (2) of the programme are solution agnostic, therefore the CSIR will not be enhancing or acquiring any ERP systems at this stage.
- Subsequent phase(s) of the programme will be dependent on the outcomes of phase two (2).

## 3 REQUEST FOR INFORMATION

The purpose of this RFI is to acquire the assistance of an independent service provider specialising in ERP technology requirements to provide relevant and comprehensive information from industry to enable the CSIR ICT Services to:

- **3.1** Assess the number of service providers available within the market, showcasing their strengths, specialisation, and track record in developing user, functional, technical requirements specifications, and evaluation criteria.
- **3.2** Obtain estimates related to the anticipated costs, projected timelines, and methodology/approach (only to be executed after an appointment is made through phase 2 of the programme) to:

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- **3.3** Develop the CSIR user, functional and technical requirements/specifications for desired state (TO-BE);
- 3.4 Compare and formulate the developed requirements/specifications for bridging the gap between the desired state (TO-BE) to the CSIR's current ERP capabilities (AS-IS)
- **3.5** Assist with the development of an evaluation criteria including a metrics for ERP selection and or enhancement.

These estimates will amongst others; aid in budgetary planning, technical scope enhancements and/or definition and resource allocation for the RFP as the next phase of the programme.

## 4 RFI SPECIFICATIONS

#### 4.1 Technical requirements

Respondents are requested to provide the following details for developing the user, functional and technical requirements specifications, that can assist with the development of evaluation criteria including metrics for ERP selection. For the RFI respondents to provide the relevant artefacts including but not limited to the items listed below that will enable a successful ERP review:

- **4.1.1** Respondents should include high-level proposed timelines (durations), milestones, deliverables, resources required, and services costing;
- **4.1.2** Respondents should include details on the project management approach including communication plans;
- **4.1.3** Respondents should include details on how data (including confidential, personal and special personal information) will be handled;
- 4.1.4 Respondents should include details on how they comply with the Protection of Personal Information Act, no. 4 of 2013, and other relevant privacy legislation e.g., General Data Protection Regulation (GDPR);
- **4.1.5** Respondents should include details on the technical and organisational controls that they have in place to safeguard the personal and special personal information.
- **4.1.6** Respondents should indicate if cloud service providers will be used and where in the world the servers reside; and

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**4.1.7** Respondents should consider that they will need to work with an internal Business Analyst and Systems Analyst and that knowledge transfer will need to occur.

### 4.2 Basic ERP Capabilities

Respondents are requested to provide RFI responses considering capabilities and functionalities of ERP solutions that can meet the following but not limited to:

- Financial Management;
- Human Resources Management;
- Customer Relationship Management (CRM);
- Enterprise Asset Management;
- Legal Process Management;
- Portfolio, Programme and Project Management;
- Safety, Health and Environment (SHE) capabilities;
- Supply Chain Management;
- Business Intelligence and Analytics;
- Governance, Risk and Compliance Management;
- Facilities Management and
- Product Life Cycle Management

Respondents may be required to present their response with sample artefacts for all the technical requirements as listed in section 4 of this RFI.

## 4.3 **Profile Information**

- **4.3.1** Respondents to provide company profile with relevant experience in ERP technologies, specifically knowledge of ERP best practices, and years of relevant experience;
- **4.3.2** Respondents to include at least two contactable references from previous clients, where requirements, specifications and evaluation criteria including metrics for an ERP solution were developed successfully;
- **4.3.3** List current offices and locations.

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#### 4.4 Pricing

- **4.4.1** Respondents to provide a detailed cost schedule including rand estimates and hours for the items as per section 3.2. These estimates will aid in budgetary planning.
- **4.4.2** Pricing must be provided in South African Rand (including all applicable taxes less all unconditional discounts).
- **4.4.3** Prices that are subject to escalation and exchange rate fluctuations are to be clearly indicated, with the currency and ROE used in the quotation must be clearly indicated.

#### SECTION B – TERMS AND CONDITIONS

#### 5 VENUE FOR PROPOSAL SUBMISSION

- 5.1 All information/proposals are to be submitted electronically to <u>tender@csir.co.za</u>.No late proposals will be accepted.
- **5.2** All proposals will only be considered if received by the CSIR before the closing date and time (*as indicated on the cover page*).
- **5.3** All proposal submissions are to be clearly subject-referenced with the **<u>RFI number</u>** <u>and **RFI Description**</u>.
- **5.4** Proposals submitted must be signed by a person or persons duly authorised.
- 5.5 Proposals submitted at incorrect location and/or address, will not be accepted for considerations and where practicable, will be returned unopened to the Respondent(s).
- **5.6** Proposals received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, will be returned unopened to the Respondent(s).
- **5.7** All dates and times in this bid are South African standard time.
- **5.8** Any time or date in this bid is subject to change at the CSIR's discretion. The establishment of a time or date in this bid does not create an obligation on the part of the CSIR to take any action or create any right in any way for any respondent to demand that any action be taken on the date established. The respondent accepts that, if the CSIR extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.
- **5.9** Documents submitted via cloud solutions such as: WeTransfer, Google Drive, Dropbox, etc. will not be considered.
- **5.10** The naming / labelling syntax of files or documents must be short and simple.
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**5.11** Should the submission file size exceed 25MB, respondents must submit in multiple emails. Use RFI 7039/19/04/2024 and the description of the RFI as the subject of the email.

#### 6 RETURNABLE DOCUMENTS

**Returnable Documents** means all the documents, Sections and Annexures, as listed in the tables below.

**Essential Returnable Documents:** 

Respondents are urged to ensure that all these documents are returned with their proposals. However, if the respondent indicates YES in the SUBMITTED column and the documents are not submitted, the respondent may be given two (2) working days to provide the missing information.

Please confirm submission of these essential Returnable Documents by indicating Yes or No in the table below

| ESSENTIAL RETURNABLE DOCUMENTS  | SUBMITTED<br>[Yes/No] |
|---|-----------------------|
|   |                       |
| Technical Response (refer to section 4.1)                                     |                       |
| Respondent must include details on how data (including confidential,          |                       |
| personal and special personal information) will be handled (refer to section  |                       |
| 4.1.3)  |                       |
| Respondents must include details on how they comply with the Protection       |                       |
| of Personal Information Act, no. 4 of 2013, and other relevant privacy        |                       |
| legislation e.g., GDPR (refer to section 4.1.4)                               |                       |
| Respondent must include details on the technical and organizational           |                       |
| controls that they have in place to safeguard the personal and special        |                       |
| personal information (refer to section 4.1.5)                                 |                       |
| Company Profile (refer to section 4.3.1)                                      |                       |
| Respondents to include at least two contactable references from previous      |                       |
| clients, where requirements, specifications and evaluation criteria including |                       |
| metrics for an ERP solution were successfully developed (refer to section     |                       |
| 4.3.2)  |                       |
| List current offices and locations (refer to section 4.3.3)                   |                       |
| Pricing Schedule (refer to section 4.4)                                       |                       |
| Annexure A: Standard Bidding Document (SBD) 1 Form                            |                       |
| Annexure B: Standard Bidding Document (SBD) 4 Form                            |                       |
| Valid copy of B-BBEE certificate/ sworn affidavit                             |                       |

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| ESSENTIAL RETURNABLE DOCUMENTS   | SUBMITTED<br>[Yes/No] |
|--|-----------------------|
|  |                       |
| <ul> <li>In case of unincorporated trust, consortium or joint venture,<br/>they must submit their consolidated B-BBEE scorecard with<br/>their <u>individual B-BBEE Certificate or Sworn Affidavit</u>.</li> </ul> |                       |
| In case of sub-contracting both parties must submit copies of their valid B-   |                       |
| BBEE certificates  |                       |

## 7 DEADLINE FOR SUBMISSION

RFI submissions shall be submitted to <u>tender@csir.co.za</u> no later than the closing date of **Friday, 19 April 2024** at 16:30.

Where the CSIR does not receive a submission by the due date and time via the stipulated email address, it will be regarded as a late submission. Late submissions may not be considered.

## 8 REVIEWING PROCESS

There is no preferential point system for this RFI as this is not a tender however, respondents are requested to provide or indicate their B-BBEE status.

## 9 BUDGETARY PRICING PROPOSAL

Respondents to provide detailed cost estimates for the ERP technology review and recommendation for all tasks, milestones, and deliverables.

## 10 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFI shall be submitted in writing to CSIR at <u>tender@csir.co.za</u> with *"RFI No. 7039/19/04/2024 - Identifying Specialist Service Providers capable of Defining Requirements and Evaluation Criteria for the Selection of, or Enhancement of an Enterprise Resource Planning (ERP) Solution.* 

#### **11 MEDIUM OF COMMUNICATION**

Any other contact with CSIR personnel involved in this RFI is not permitted during the RFI process other than as required through existing service arrangements or as requested by the CSIR as part of the RFI process.

All documentation submitted in response to this RFI must be in English.

#### 12 COST OF SUBMISSION

Respondents must fully acquaint themselves with this RFI's conditions, requirements, and specifications before submitting. Each respondent assumes all risks for resource commitment and expenses, direct or indirect, of their submission preparation and participation throughout the RFI process. The CSIR is not responsible directly or indirectly for any costs incurred by the respondents of this RFI.

#### **13 CORRECTNESS OF RESPONSES**

- **13.1** The respondent must confirm satisfaction regarding the correctness and validity of their submission and that all prices and rates quoted cover all the work/items specified in the RFI.
- **13.2** The respondent accepts that any mistakes regarding the solution, budgetary pricing, and calculations will be at their own risk.

#### **14 VERIFICATION OF DOCUMENTS**

14.1 Respondents should check the numbers of the pages to satisfy themselves that none are missing or duplicated. The CSIR will accept no liability regarding anything arising from the fact that pages are missing or duplicated.

## **15 ADDITIONAL TERMS AND CONDITIONS**

- **15.1** A respondent shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.
- **15.2** Copies of affiliations, memberships and/or accreditations supporting submission can be included at the respondent's discretion.

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### 16 CSIR RESERVES THE RIGHT TO

- **16.1** Extend the closing date;
- **16.2** Verify any information contained in a submission;
- 16.3 Cancel or withdraw this RFI as whole or in part;
- **16.4** Request documentary evidence regarding any response issue; and/or
- **16.5** Only approach or target respondents of this RFI, should the CSIR proceed to the next phase/s stage of the programme.

#### **17 DISCLAIMER**

This RFI is a request for information only and not an offer document. Submissions to this RFI must not be construed as an acceptance of an offer or imply the existence of a contract between the parties. By submitting, respondents shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFI. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to respondents concerning the RFI, whether regarding its accuracy, completeness or otherwise and the CSIR shall have no liability towards the respondent or any other party in connection therewith.

#### Annexure A Standard Bidding Document (SBD) 1

## PART A: INVITATION TO BID

| YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CSIR   |                           |  |             |                           |                 |              |
|--|---------------------------|--|-------------|---------------------------|-----------------|--------------|
|  | 9/19/04/2024              | CLOSING DAT  |             | Friday, 19 April<br>2024  | TIME:           | 16H30        |
| DESCRIPTION Identifying Specialist Service Providers capable of Defining Requirements and Evaluation Criteria for the Selection of, or Enhancement of an Enterprise Resource Planning (ERP) Solution |                           |  |             |                           |                 |              |
| BID RESPONSE I   |                           |  |             |                           |                 |              |
| In light of the Covid-1<br>tender@csir.co.za. Sh<br>numbera  | ould tender file size     | ze exceed 25MB   | , bidders s | ubmit tender in m         |                 |              |
| BIDDING PROCI  |                           |  | Subject on  | your email.               |                 |              |
| DIRECTED TO  | 1                         |  |             | INICAL ENQUIRI            |                 |              |
| CONTACT PERSON   | Strategic Procu           | rement Unit  | CONTAC      | T PERSON                  | Strategic Procu | urement Unit |
| TELEPHONE<br>NUMBER  | 012 841-2911              |  | TELEPHO     |                           | 012 841-2911    |              |
| FACSIMILE NUMBER   | -                         |  | FACSIMI     | LE NUMBER                 | -               |              |
| E-MAIL<br>ADDRESS  | tender@csir.co            | . <u>za</u>  | E-MAIL A    | DDRESS                    | tender@csir.co  | <u>).za</u>  |
| SUPPLIER INFOR   | RMATION                   |  |             |                           |                 |              |
| NAME OF BIDDER   |                           |  |             |                           |                 |              |
| POSTAL ADDRESS   |                           |  |             |                           |                 |              |
| STREET ADDRESS   |                           | 1  |             |                           |                 |              |
| TELEPHONE<br>NUMBER  | CODE                      |  |             | NUMBER                    |                 |              |
| CELLPHONE<br>NUMBER  |                           |  |             |                           |                 |              |
| FACSIMILE  |                           |  |             |                           |                 |              |
| NUMBER   | CODE                      |  |             | NUMBER                    |                 |              |
| E-MAIL ADDRESS   |                           |  |             |                           |                 |              |
| VAT REGISTRATION<br>NUMBER   |                           |  |             |                           |                 |              |
| SUPPLIER   | TAX                       |  |             | CENTRAL                   |                 |              |
| COMPLIANCE   | COMPLIANCE<br>SYSTEM PIN: |  | OR          | SUPPLIER                  |                 |              |
| STATUS   | STSTEW PIN.               |  |             | DATABASE<br>No:           | MAAA            |              |
| 1 ARE YOU<br>THE ACCREDITED<br>REPRESENTATIVE  | □Yes<br>No                |  | FOREIGN     | RE YOU A<br>NBASED SUPPLI | ER Yes          | s 🗌 No       |
| IN SOUTH AFRICA<br>FOR THE GOODS<br>/SERVICES /WORKS   | [IF YES EN<br>PROOF]      | NCLOSE FOR THE GOODS [IF YES, ANSWER<br>/SERVICES /WORKS OFFERED? [IF YES, ANSWER<br>THE QUESTIONNAIRE<br>BELOW] |             |                           |                 |              |
|  |                           |  |             |                           |                 |              |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS   |                           |  |             |                           |                 |              |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  |                           |  |             |                           |                 |              |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?  |                           |  |             |                           |                 |              |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?   |                           |  |             |                           |                 |              |

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|      | DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?<br>YES INO  |   |
|------|---|---|
|      | IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?<br>YES  |   |
|      | IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR   |   |
| A T  | AX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS)  |   |
| AN   | D IF NOT REGISTER AS PER 2.3 BELOW.   |   |
|      |   |   |
| 4    | PART B: TERMS AND CONDITIONS FOR BIDDING  | _ |
|      | BID SUBMISSION:   |   |
| 1.1. | . BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT<br>BE ACCEPTED FOR CONSIDERATION.  |   |
| 1.2. | ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.   | : |
| 1.3. | . THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. |   |
| 1.4. | THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).  | ł |
|      | TAX COMPLIANCE REQUIREMENTS   |   |
| 2.1  | BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.  |   |
| 2.2  | BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED<br>BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.  | ) |
| 2.3  | APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS<br>WEBSITE WWW.SARS.GOV.ZA.   | ; |
| 2.4  | BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.  |   |
| 2.5  | IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.  | , |
| 2.6  | WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.   |   |
| 2.7  | NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH<br>DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH<br>MEMBERS PERSONS IN THE SERVICE OF THE STATE."                   |   |

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

| SIGNATURE OF BIDDER:  |         |
|---|---------|
| CAPACITY UNDER WHICH THIS BID IS SIGNED:<br>(Proof of authority must be submitted e.g. company reso | lution) |

DATE:

-----

#### Annexure B Standard Bidding Document (SBD) 4

### BIDDER'S DISCLOSURE

#### 1. PURPOSE OF THE FORM

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

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

#### 2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state?
- 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 Sta<br>institution | ite |
|-----------|-----------------|----------------------------|-----|
|           |                 |                            |     |
|           |                 |                            |     |
|           |                 |                            |     |
|           |                 |                            |     |
|           |                 |                            |     |
|           |                 |                            |     |

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:

<sup>&</sup>lt;sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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.....

- 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?
- 2.3.1 If so, furnish particulars:

.....

#### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 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.
- 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.

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