

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO ASSIST THE DEPARTMENT OF MINERAL AND PETROLEUM RESOURCES (DMPR) AND MINE HEALTH AND SAFETY INSPECTORATE (MHSI) WITH EDITING/LAYOUT/DESIGN AND PRINTING OF STRATEGIC PLANS, ANNUAL PERFORMANCE PLAN, AND ANNUAL REPORTS FOR A PERIOD OF THIRTY-SIX (36) MONTHS

1. BACKGROUND AND MOTIVATION

- 1.1. Chapters 5 and 30 of the Treasury Regulations, read together with the Revised Framework for Strategic Plans and Annual Performance Plans (APPs), require the Accounting Officer to prepare a strategic plan/APP for approval by the relevant Executive Authority and tabling in Parliament.
- 1.2. Strategic plans reflect the intended departmental outcomes that will help to achieve the government's priorities and realise the department's mandate.
- 1.3. Strategic plans institutionalise the priorities set out in the NDP, the MTSF, and any other government medium- and long-term plans.
- 1.4. The five-year strategic plan, which is aligned with the planning cycle, gives the Department's impact statement, intended outcomes, related outcome indicators, and five-year targets for the outcomes.
- 1.5. The strategic plan informs the annual performance of the Department, whose strategic focus must be linked to the allocated budget based on its mandate.
- 1.6. The APP describes the Department's intended outputs that will enable it to achieve the outcomes and impact statements stated in the strategic plan.
- 1.7. The outputs stated in the APP must inform the budget and must include the audited performance of the past three planning years, the estimated performance for the current year, and forward projections for the medium-term period.
- 1.8. The annual performance planning process is informed by the strategic planning process.
- 1.9. The Mine Health and Safety Inspectorate (MHSI) in terms of section 49(1) (j) of the Mine Health and Safety Act, 1996 (Act No. 29 of 1996) as amended [MHSA, 1996], requires the Chief Inspector of Mines (CIOM) to prepare a report on the activities of the MHSI as well as the occupational health and safety in South African mines on an annual basis.

- 1.10. The Departmental Annual Report provides information about the department's performance in the preceding financial year, enabling performance review, learning, and oversight.
- 1.11. Annual reports are developed based on APPs.
- 1.12. Section 40 (1) and (3) of the PFMA read together with Chapter 18.3 and 18.4 require state institutions within five (5) months of the end of a financial year to submit to the relevant treasury an annual report on the activities of the department, annual financial statements after it has been audited, and the Auditor-General's report on these statements.
- 1.13. Considering the abovementioned context, the Department of Mineral and Petroleum Resources requires a panel of service providers with skilled resources and adequate experience for editing, layout, design, and printing of the Department of Mineral and Petroleum Resources' strategic plans, APPs, and annual reports for a period of three (3) years.

2. CONTRACT PERIOD

- 2.1. The successful service provider will be listed on the panel for a period of thirty-six (36) months-and will be utilized as and when a need arises.

3. OBJECTIVE

- 3.1. To appoint a panel of service providers to assist the Department of Mineral and Petroleum Resources with editing/layout/design and production of strategic plans, APPs, and annual reports for a period of thirty-six (36) months

4. SCOPE OF WORK

- 4.1. The selected panel of service providers is expected to have the necessary expertise and capacity to produce the Department of Mineral and Petroleum Resources' annual reports/APP/strategic planning document and undertake the following activities:
 - 4.1.1. Compile supplied parts of the APP/Strategic Plan/annual reports into one appropriately formatted and numbered document.

- 4.1.2. Proofread, edit, grammar and spell check, consultatively edit, and ensure quality and the technical consistency of the APP/ Strategic Plan and the annual reports.
- 4.1.3. Design and layout of the APP/strategic plan/annual report.
- 4.1.4. Timely printing of the strategic plan, APP, and annual reports.
- 4.1.5. Supply electronic copies on branded USBs.

5. DELIVERABLES OR PROJECT OUTPUT AND OR OUTCOME

5.1 DMPR STRATEGIC PLAN/APP/ANNUAL REPORT

- 5.1.1 The service provider will be expected to produce the strategic plan/APP/annual report in line with the following specifications:

- 5.1.1.1 Approximately a three-hundred-and-fifty (350) page report using back-to-back printing in portrait orientation, as well as landscape orientation where appropriate.
- 5.1.1.2 Inside pages to include contact information (inside front cover), energy saving tips (back cover), and appropriate and judicious use of the Department's Coat of Arms.
- 5.1.1.3 Provide the Department with three (3) dummy full colour copies for approval prior to the full production run.
- 5.1.1.4 One hundred and twenty hard (120) copies (300 GSM glossy laminated paper front images-spot UV200, and 30 copies of branded USBs.
- 5.1.1.5 It is required to provide equivalent previous work samples and proof of production to demonstrate competence to undertake the project.

5.2 MHSI ANNUAL REPORT

- 5.2.1 Design, layout, editing, and printing of the MHSI Annual Report.
- 5.2.2 Page orientation: Portrait.
- 5.2.3 Page size: A4 (297 X 210 mm).
- 5.2.4 Number of pages: ±116 pages (including the nine index tabs) plus the four cover pages, totalling ±120 pages.
- 5.2.5 Paper quality (text pages): approximately 135-gram thickness; mat finish.
- 5.2.6 Paper quality (cover pages): approximately 300-gram thickness; mat finish; laminated.
- 5.2.7 Binding: Spiral binding (wire binding).

- 5.2.8 Images: Source five photographs, including at least one image focusing on women in mining.
- 5.2.9 Provide three mock-ups (designs) prior to typesetting to enable the management of the MHSI to consider and select an option.
- 5.2.10 Ensure that the editing of the publication occurs prior to the commencement of the typesetting to prevent unnecessary changes to the proofs.
- 5.2.11 Provide three proofs prior to printing.
- 5.2.12 Provide the complete publication in PDF format not exceeding 2 MB.
- 5.2.13 Provide 200 books and 100 USBs (flash disks) with ± 2 GB capacity.
- 5.2.14 Produce an MHSI Annual Report in adherence with the scope of work and the corporate identity of the DMPR, with no grammatical or other errors on the specified delivery date.
- 5.2.15 Good quality work, creative design, as well as the sourcing of the required material as per the terms of reference.
- 5.2.16 Accurate information as provided by the MHSI

6. EVALUATION CRITERIA

This bid will be evaluated in stages: functionality, administrative compliance, and the point-scoring system.

6.1. Gate 01 – Mandatory requirements

- 6.1.1. The mandatory requirements shall not apply to this project.

6.2. Gate 02 - Functionality

Bidders will be scored in terms of the functional requirements indicated in the table below. The corresponding points and weightings will be used to calculate the overall score a bidder has achieved. The minimum threshold for this bid is **70%**. Bidders who score less than **70%** will be disqualified. Only bidders who score **70%** and more will be considered further.

NO	CRITERIA	SCORING	WEIGHTS
1.	Company Experience:		15
	i) Service providers should have experience in the production of the reports.	5 years' experience = 5 points 4-year experience = 4 points	15
	ii) Proof from contactable referees indicating that similar project/s was/were executed.	3 years' experience = 3 points 2 years' experience = 2 points No experience = 1 point	
2.	Team leader and team member experience:		15
	i) The team leader must have experience in the production of reports.	7 projects = 5 points 6 projects = 4 points 5 projects = 3 points 4 projects = 2 points 1-3 projects = 1 point	8
	ii) Team members must have experience in the production of reports.	5 projects = 5 points	7
	iii) CVs with three (3) contactable references must be attached as proof.	4 projects = 4 points 3 projects = 3 points 2 projects = 2 points 1 project = 1 point	
3.	Qualifications		20
	i) Team leader must have an appropriate certificate/ bachelor's degree or an appropriate postgraduate diploma in communication / marketing / information science / Art / graphic design / economics /	NQF level 9 above = 5 points NQF level 8 = 4 points NQF level 7 = 3 points NQF level 6 = 2 points	10

	BCom / public administration / auditing / engineering / law / BA Information Design. A master's and/or doctoral degree will be an added advantage. ii) Team members must have an appropriate certificate/ bachelor's degree or an appropriate postgraduate diploma in communication/marketing/information science / Art / graphic design/ economics / BCom / public administration/auditing/engineering/law / BA Information Design. A master's and/or doctoral degree will be an added advantage.	NQF level 5 = 1 point NQF level above 9 = 5 points NQF level 8 = 4 points NQF level 7 = 3 points NQF level 6 = 2 points NQF level 5 = 1 point	10
4	Project Plan and Methodology i) Project Plan: Detailed Project / Execution Plan and Management should be attached.	Detailed project plan with project deliverables and detailed logistics plan, milestones, scope, schedule, cost, resources & change management plan = 5 points Detailed project plan with project deliverables, logistical plan, milestones, scope, schedule, cost & resources = 4 points Project plan with project deliverables, inadequate	40 20

	logistical plan, milestones, scope, schedule, cost & resources = 3 points Inadequate Project Plan and logistical plan, and with project deliverables, milestones, scope, schedule, cost & resources = 2 points No Project and logistical plan=1 point	
ii) Proposed Methodology	Methodology outlining management of the project = 5 points Methodology outlining adequate management of the project = 4 points Methodology with only description of services = 3 Methodology provided without the required services = 2 points Methodology not provided = 1 point	20
Skills Transfer	Detailed Proof of capability to transfer skill = 5 points Non-submission of proof of capability: Transfer	10

		skills not provided = 1 point	
Total			100

Formula: $\frac{A}{B} \times 100 = C\%$

Where:

A = Total score for the bid under consideration.

B = Maximum possible score.

C = Percentage score for the bid under consideration.

6.3. Gate 03 - Administrative compliance

- (i) Compliance with the specification/terms of reference.
- (ii) Fully completed SBDs (duly signed and dated) listed hereunder:
 - SBD 1
 - SBD 4
 - SBD 6.1
- (iii) The following will be regarded as noncompliance.
 - Price amendments / other amendments without signature/initials.
 - Use of correctional fluid.
 - Completion of the bid document in coloured ink other than black ink.
- (iv) Bidders are required to submit a company profile.

6.4. Gate 04 – Point Scoring System

- 6.4.1 Bids will be evaluated on the 80/20 preference point system as outlined in the Preferential Procurement Regulation of 2022.
- Price points = 80
 - Preferential points = 20
- 6.4.2 The bidder that scores the highest points in this phase will be awarded the tender.
- 6.4.3 Should more than one bidder score the same number of points, the award will be made to the bidder who scores more points on specific goals.
- 6.4.4 Should there be more than one bidder who scores the same number of points overall and the same points on specific goals, the award will be made to the bidder who scored the highest points on functionality.

- 6.4.5 Should there be more than one bidder who scores the same number of points in all aspects, the bid will be determined by the drawing of the lot.
- 6.4.6 The preferential points will be allocated in terms of the Departmental objectives on specific goals. Points allocation on specific goals is tabulated hereunder.
- 6.4.7 Bidders who do not submit proof (means of verification) of specific goals claimed will not qualify for preference points for specific goals.

Specific Goal	Number of points (80/20 Preference System)	Means of Verification
Enterprise owned by Black people	4	Identity documents and CIPC document
Enterprise owned by Women	4	Identity documents and CIPC document
Enterprise owned by Youth	4	Identity documents and CIPC document
Enterprise owned by disabled persons	4	Medical certification
Enterprise owned by SMMEs (QSE or EME)	4	B-BBEE certificate issued by a SANAS-accredited agency or DTIC, or a sworn affidavit

NB: Ownership = 51% of the company share.

Designated group/person that is part of the entity directorship but has less than 51% share = points will be calculated on a pro-rata basis in relation to the share/s held by the designated group/persons.

E.g.	Number of women directors	= 01
	Shares owned by women	= 20%
	Specific goal for women	= 4 points
	Points claimable for women's ownership	= $\frac{20}{100} \times 4 = \mathbf{0.8 \text{ points}}$

7. REPORTING REQUIREMENTS

- 7.1. Kick-off meeting for the plenary will be convened with the Project Manager, and feedback on progress status will be provided, as and when necessary.
- 7.2. The venue for these meetings will be virtual and/or physical at the Department of Mineral and Petroleum Resources' Head Offices, Trevenna Campus, Cnr Francis Baard & Meintjies Streets, Sunnyside, Pretoria. The service provider's Project Manager will be obliged to attend and will report to the respective project managers from the Department.
- 7.3. Any patents or copyrights developed from this project will belong to the Department of Mineral and Petroleum Resources.
- 7.4. The service provider will be expected to provide all the project management documents in line with the Department of Mineral and Petroleum Resources' methodology.

8. WORK PLAN AND METHODOLOGY

- 8.1. A project plan with intermediate and final outputs and identified timeframes/milestones/resources (the project plan should be detailed and in Microsoft Project format or equivalent project management tool).
- 8.2. Proposed methodology.
- 8.3. Management of the project.
- 8.4. The successful service provider will be required to present their Project Execution Plan.
- 8.5. The service provider needs to note that the Department uses a Microsoft technology stack and intends to use all available Microsoft technologies to the best of its ability.

9. ROLES AND RESPONSIBILITIES

- 9.1. A Service Level Agreement will be entered into with the successful service provider, which will include, *inter alia*, obligations of the Department of Mineral and Petroleum Resources and the successful service provider.
- 9.2. The Department of Mineral and Petroleum Resources reserves the right to appoint more than one service provider for the project.
- 9.3. The successful service provider must develop a detailed project schedule/plan.
- 9.4. The successful service provider will be required to submit a payment schedule providing projections for the period of 6 months on work performed.

- 9.5. The service provider shall disclose all information in its proposal regarding any interests that may result in an actual or perceived conflict of interest.

10. CONFIDENTIALITY OF INFORMATION

- 10.1. The names of all the members of the service provider team must be disclosed for the prior approval of the Department of Mineral and Petroleum Resources. Any changes, replacements, and additions should be submitted for prior approval of the Department of Mineral and Petroleum Resources.
- 10.2. All members will have to sign a non-disclosure agreement before the project commencement and may be required to undergo security screening and tests as the Department of Mineral and Petroleum Resources deems necessary.

11. PAYMENT

- 11.1. The Department will not make an upfront payment to a successful service provider. Payment will only be made in accordance with the delivery of service that will be agreed upon by both parties and upon receipt of an original invoice.
- 11.2. Payments will only be made in accordance with the delivery of services and after receipt of an original invoice.

12. TAX CLEARANCE CERTIFICATE

- 12.1. The potential service provider/s must ensure compliance with their tax obligations.
- 12.2. The potential bidder/s is/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.
- 12.3. Application for tax compliance status (TCS) or PIN may also be made via e-filing. To use this provision, taxpayers will need to register with SARS as e-filers through the website www.sars.gov.za.
- 12.4. The potential bidder may also submit a printed TCS together with the proposal.
- 12.5. In proposals where consortia / joint ventures / sub-contractors are involved, each party must submit separate proof of TCS / PIN / CSD number.

- 12.6. Where no TCS is available, but the potential bidder/s is registered on the central supplier database (CSD), a CSD number must be provided.

13. DOCUMENTATION

- 13.1. The Department will provide the draft Strategic Plan, Annual Performance Plan and Annual Report documents.

14. COST / PRICING

- 14.1. The bidders are requested to provide a quoted proposal regarding the work to be undertaken.
- 14.2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases, including all expenses, inclusive of all applicable taxes for the project. The total cost must be VAT-inclusive and should be quoted in South African Rands (i.e., ZAR).
- 14.3. Bidders should provide hourly rates as prescribed by the Department of Public Service and Administration (DPSA), the Auditor-General (AG) or the body regulating the profession of the consultant.
- 14.4. Bidders should provide (Subsistence & Travel (S&T) rates that are in aligned with the National Treasury instruction note as follows:
- i) Hotel Accommodation – R1700 per night per person, including breakfast, dinner, and parking.
 - ii) Air travel must be restricted to economy class.
 - iii) Claims for kilometres may not exceed the rates approved by the Automobile Association of South Africa.

15. CONDITIONS OF THE CONTRACT

- 15.1. The General Conditions of Contract must be accepted as these are issued by the National Treasury and are non-negotiable.
- 15.2. The successful service provider will sign a confidentiality agreement regarding the protection of

- 15.3. Department of Mineral and Petroleum Resources information that is not in the public domain.
- 15.4. The successful service provider shall ensure that the contract is executed in line with the scope of work.
- 15.5. The successful service provider may be subjected to security screening by the State Security Agency.
- 15.6. The Department of Mineral and Petroleum Resources reserves the right to verify the authenticity of the information submitted; any falsified information may result in the disqualification or cancellation of the contract.
- 15.7. The Department reserves the right to terminate the contract should the appointed service provider.
- 15.8. The provider misrepresents itself and is not able to meet the requirements of the contract (which might result in the Department failing to deliver on its mandate).
- 15.9. Where service providers are contracted for a specific service, they will be contracted for a period not exceeding twelve (12) months.

16. FORMAT OF SUBMISSION OF PROPOSAL

- 16.1. Service providers are requested **to submit one (1) copy of the technical proposals plus one (1) original.**
- 16.2. The original and copies must be clearly marked as “Original” and “Copy” respectively.
- 16.3. Service providers are requested to index their proposals for easy reference.

17. PRE-BID MEETING / BRIEFING SESSION DETAILS

- 17.1. No briefing session.

18. CLOSING DATE

- 18.1. Proposals must be submitted on or before **13 August 2026 at 11:00** at the Department of Mineral and Petroleum Resources’ Head Offices, Trevenna Campus, Cnr Francis Baard & Meintjies Streets, Sunnyside, Pretoria in the bid box.
- 18.2. **No late bids will be accepted.**

19. ENQUIRIES

19.1. All general enquiries relating to bid documents should be directed to:

Mr. Tebogo Katjeni /Ms. Lucia Nkethoa

Tel No: (012) 444 3197/3778

E-mail: Tebogo.Katjeni@dmpr.gov.za/Lucia.Nkethoa@dmpr.gov.za

19.2. Technical enquiries can be directed to:

Ms Olgah Theledi

Tel: (012) 444 3079

E-mail address: Olgah.theledi@dmpr.gov.za