

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE COMMUNITY SCHEMES OMBUD SERVICE

BID NUMBER:	RFQ020-2026	CLOSING DATE:	12 March 2026	CLOSING TIME:	12:00 PM
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DESCRIPTION	TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.
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BID RESPONSE DOCUMENTS MAY BE EMAILED TO THE BELOW (EMAIL ADDRESS)

quotations1@csos.org.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO	TECHNICAL ENQUIRIES MAY BE DIRECTED TO:
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CONTACT PERSON	Nonkululeko Mthethwa	CONTACT PERSON	Nonyameko Ngxeke
TELEPHONE NUMBER	(010) 593 0533	TELEPHONE NUMBER	(010) 593 0533
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	quotations1@csos.org.za	E-MAIL ADDRESS	nonyameko.ngxeke@csos.org.za

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	

[A DETAILED CSD REPORT REFLECTING EME OR QSE 51% OR MORE BLACK OWNERSHIP FOR AT LEAST ONE OF THE DESIGNATED GROUPS MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR SPECIFIC GOALS]

<p>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p><input type="checkbox"/>Yes <input type="checkbox"/>No [IF YES ENCLOSE PROOF]</p>	<p>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p><input type="checkbox"/>Yes <input type="checkbox"/>No [IF YES, ANSWER PART B:3]</p>
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?
 YES NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA?
 YES NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?
 YES NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?
 YES NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?
 YES NO

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

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. 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).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO 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 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 IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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:
(Proof of authority must be submitted e.g., company resolution)

DATE:

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.



REQUEST FOR PROPOSAL (RFP)

**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR
THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD
OF 4 MONTHS**

March 2026

1. TERMS AND CONDITIONS

This Request for Proposal (RFP) has been compiled by the CSOS and is made available to Bidders subject to the following terms and conditions, which Bidders are deemed to acknowledge and accept:

- 1.1. A Quotation submitted in response to this RFP will constitute a binding offer that will remain binding and irrevocable for one hundred and twenty (90) days from submission to the CSOS.
- 1.2. Unless or until a binding contract is concluded between the CSOS and the successful Bidder, the offer constituted by the quotation will be deemed not to have been accepted, and no agreement will be considered to have been reached with any Bidder.
- 1.3. The CSOS reserves the right to amend, modify, withdraw or terminate this RFP or any of the requirements set out herein at any time (and from time to time) without prior notice and without liability to compensate or reimburse any Bidder or person.
- 1.4. Should this RFP be amended, the CSOS will publicise or send each Bidder the amended RFP in writing. No oral amendments by the Bidder or the CSOS shall be considered.
- 1.5. It is compulsory for a Bidder submitting a quotation to be registered on the National Treasury's Central Supplier Database ("the CSD") and ensure that it remains registered for the duration of the services and/or contract, if successful.
- 1.6. The Bidder needs to ensure that it is tax compliant at the time of submitting its quotation and remains tax compliant for the duration of the contract and/or services, if successful, and undertakes to provide supporting documentation issued by the South African Revenue Services ("SARS") confirming it is tax compliant upon request by the CSOS.
- 1.7. The CSOS reserves the right to conduct site inspections or call for supporting documentation to confirm any information provided by a Bidder in its response to this quotation.
- 1.8. This RFP is not intended to form the basis of a decision to enter into any transaction with the CSOS and does not constitute an offer or recommendation to enter into such transaction or an intention to enter into any legal relationship with any person.
- 1.9. Neither the CSOS nor its respective directors, officers, employees, agents, representatives, or advisors will assume responsibility for any costs or expenses incurred by any party in preparing or submitting a quotation in response to this RFP.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

- 1.10. No entity or associated entities may be involved, whether directly or indirectly, in more than one quotation in response to this RFP. Failure to comply with this requirement may, within the sole discretion of the CSOS, result in disqualification of both entities.
- 1.11. Any material changes in the control and/or composition of any Bidder or any core member of a Bidder after submission of a quotation must be brought to the attention of the CSOS Supply Chain Management (“SCM”) Section in writing. The CSOS shall be the sole arbiter as to what constitutes a material change in the control and/or composition of any Bidder and may, in its sole discretion, disqualify the Bidder from any further participation in the bid process.
- 1.12. Any requirement set out in this RFP which stipulates the form and/or content of any aspect of a quotation is specified for the sole benefit of the CSOS and, unless the contrary is expressed, may be waived by the CSOS in its sole discretion at any stage in the bid process.
- 1.13. The CSOS and its advisors shall rely on an accurate and complete quotation about the information and proposals provided therein by the Bidders.
- 1.14. All quotations submitted to CSOS become CSOS’s property and will not be returned to the Bidders. CSOS will make all reasonable efforts to keep the proposal information confidential.
- 1.15. A quotation submitted by the Bidder will be considered non-responsive if it contains omissions or irregularities. However, the CSOS reserves the right to waive any aspect of non-responsiveness and make an award in the organisation’s best interest, provided that any such waiver is applied consistently across all Bidders.
- 1.16. The CSOS reserves the right to accept or reject in part or whole any submitted quotation submitted.
- 1.17. The CSOS reserves the right to require a Bidder to formally present its RFP at a date and time determined by the CSOS. The CSOS shall provide adequate instructions and clarification regarding the purpose and scope of the presentation. The Bidder shall bear all expenses.
- 1.18. In this RFP, the words “service provider” and “supplier” will be used interchangeably to refer to the Bidder.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

- 1.19. All costs associated with the preparation and submission of the quotation remain the responsibility of the Bidder. The fees shall not be charged to the CSOS by the successful or unsuccessful Bidder.
- 1.20. All quotations must be formulated and submitted according to the requirements of this RFP.
- 1.21. Quotations received after the closing date and time as specified in this RFP shall be rejected.
- 1.22. The CSOS is only obliged to appoint the lowest-priced bidder if, based on its sole discretion and assessment, the bidder exhibits or demonstrates adequate capacity or complete comprehension of the scope of work.
- 1.23. In this regard, CSOS may appoint the second-ranked bidder provided the reasons for such deviation are correctly justified and accurately recorded.

2. INTRODUCTION

- 2.1. The Community Schemes Ombud Services (CSOS) is established in the Community Schemes Ombud Services Act 2011 (Act 9 of 2011) to regulate parties' conduct within community schemes and ensure good governance. To deliver on its mandate, key amongst the priorities of the organisation is:
 - 2.1.1. Regulations of all community schemes.
 - 2.1.2. Provision of Dispute Resolution Services.
 - 2.1.3. Quality assurance and keeping custody of schemes governance documentation.
 - 2.1.4. Providing members with access to scheme governance documentation.
 - 2.1.5. Ensuring good governance within community schemes.

3. PROJECT BACKGROUND

- 3.1. Over the years, the Information, Communication, and Technology (ICT) landscape has drastically shifted from a mere support service to a strategic enabler. Through technology, ICT ensures that value is delivered at an affordable cost with minimal risk. ICT's prominence has forced many institutions, if not all, to depend on technology to deliver on their mandate, gain a competitive advantage, or improve efficiency.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

- 3.2. Technological advances continue to affect the CSOS business. Notwithstanding rapid technological changes and bubbles, the ability to adapt distinguishes good organisations from great ones. The CSOS acknowledges the importance of leveraging technology to achieve its objectives. Digital transformation at the CSOS is inevitable for existential and sustainability reasons.
- 3.3. Digital transformation implies organisational change, catalysed by digital technologies geared towards operational performance. Organisations develop digital transformation strategies for various reasons. However, there is agreement that “the purpose of the journey toward digital transformation is to reap the benefits of digital technologies, such as productivity improvements, cost reductions, and innovation, and therefore, a clear strategy for deploying and exploiting digital technologies is crucial for future business success.”
- 3.4. To achieve its objectives, the CSOS needs to improve its digital maturity. Although key digital projects are underway, the digital landscape is constantly changing, and the CSOS must also adapt; otherwise, it will remain stagnant.
- 3.5. Developing a robust CSOS digital transformation strategy is the foundation for continuous improvement, efficiency, and future sustainability.

4. PURPOSE

- 4.1. The CSOS intends to appoint a reputable service provider specialising in digital transformation to develop a strategy that considers the CSOS’s specifications, including a review of the current landscape, to strengthen its digital maturity.
- 4.2. The service provider must be a qualified South African-based ICT service provider with the capacity to develop a digital transformation strategy for CSOS.

5. SCOPE OF WORK

5.1. DEVELOPMENT OF A CSOS DIGITAL TRANSFORMATION STRATEGY:

- a) For the development of the strategy, the appointed service provider must consider the following:
 - ❖ Assessing the CSOS’s digital maturity and environment, considering existing systems, processes, and initiatives (review of the current information communication and technology landscape).

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

- ❖ Advising on priority areas of improvement.
- ❖ Development of the strategy based on the following pillars
 - (i) Governance
 - (ii) Strategic Protection
 - (iii) Legal and Regulatory Standards
 - (iv) International Standards and Good Practices
 - (v) Development and Innovation
 - (vi) Continuous Training.
- ❖ Improve CSOS's digital maturity level by relevant industry-accepted practices.
- ❖ Developing a comprehensive digital transformation strategy and roadmap towards digitalization (automation of business processes) that would be most suitable for the CSOS.
- ❖ Furthermore, the strategy must indicate a detailed recommended change management process during the digital transformation journey (strategy implementation plan).
- ❖ Importantly, the strategy must outline how information security would be guaranteed during the digital transformation process.
- ❖ Align the proposed Digital Transformation Strategy with the CSOS's new five-year strategy, emphasising enhanced efficiency, transparency, and improved oversight.

5.2. PROJECT TIME FRAME:

The appointed Service Provider will be expected to produce the following deliverables within four months.

- a) CSOS Digital Transformation Assessment Document
- b) CSOS Digital Transformation Strategy Document
- c) CSOS Digital Transformation Strategy Implementation Plan

6. SUPPLY CHAIN MANAGEMENT COMPLIANCE REQUIREMENTS

6.1. Bidders must comply with the following compliance requirements before evaluating mandatory requirements.

Documents required	Submitted Y/N
Valid B-BBEE certificate issued by an accredited SANAS verification agency /Sworn Affidavit signed by the EME representative and attested by a Commissioner of Oath/B-BBEE certificate issued by the Companies and Intellectual Property Commission (CIPC)	
Proof of registration on the National Treasury Central Supplier Database (provide full detailed CSD report or CSD number)	
Valid tax pin number/letter from SARS	
Fully completed SBD documents (SBD 1,3.3,4 & 6.1)	

7. MANDATORY REQUIREMENT

7.1 Bidders must COMPLY with the below mandatory requirements to be further evaluated on functionality evaluation and price and specific goals.

MANDATORY REQUIREMENTS	COMPLY	NOT COMPLY
<p>The service provider should have a minimum of three (3) years conducting projects of a similar nature (development of a digital transformation strategy).</p> <p>Supply three (3) reference letters pertaining to the development of a digital transformation strategy for work completed within the last five (5) years.</p> <p>The reference letters should be signed, dated and on company letterhead.</p>		

8. FUNCTIONALITY EVALUATION

- 8.1. A functional evaluation needs to be done for this bid.
- 8.2. Bidders who score less than 70% out of 100% on the functionality requirements listed below will be disqualified and will not be considered for further evaluation.
- 8.3. The functionality requirement as per TOR is as per Table below:

No	FUNCTIONALITY	WEIGHT
1	<p>The bidder must submit a proposal on the Digital Transformation Strategy approach, scope, timelines and methodology to be used.</p> <p>The key aspects to be evaluated are:</p> <ul style="list-style-type: none"> a) CSOS Digital Transformation Assessment Document b) CSOS Digital Transformation Strategy Document c) CSOS Digital Transformation Strategy Implementation Plan <ul style="list-style-type: none"> a) None of the key aspects are addressed = 0 points b) One key aspect of the methodology addressed = 1 point c) Two key aspects of the methodology addressed = 3 points d) Three key aspects of the methodology addressed = 5 points <p>NB: The project plan must be aligned with the scope and must be completed within the required timeframe of four (4) months.</p>	30
2	<p>Provide a CV/Profile of the Project Management resource who will be assigned to this project, highlighting the experience of the individual in managing the development of a digital transformation strategy.</p> <p>The Project Manager CV MUST be accompanied with a Project Management certification (PMBOK or Prince2).</p> <p>CV / Profile Criteria:</p> <ul style="list-style-type: none"> a) Less than 1 year experience = 0 points b) 1 year experience = 1 point c) 2 – 3 years’ experience = 2 points d) 4 – 5 years’ experience = 3 points f) More than 5 years’ experience = 5 points 	30
3	<p>Provide a CV/Profile of the Facilitator/Consultant who will be assigned to this project, highlighting the experience of the individual in facilitation/consultation of a digital transformation strategy.</p> <p>The Facilitator/Consultant CV/Profile MUST detail the years of experience.</p> <p>CV/Profile Criteria:</p> <ul style="list-style-type: none"> a) Less than 1 year experience = 0 points b) 1 year experience = 1 point c) 2 – 3 years’ experience = 2 points d) 4 – 5 years’ experience = 3 points f) More than 5 years’ experience = 5 points 	40
		100%

9. PRICING AND SPECIFIC GOALS

- 9.1 In order to facilitate a transparent selection process that allows equal opportunity to all bidders. Proposals will be evaluated using the 80/20 formulae (preference points system) for Price and specific goals as per the 2022 PPPFA Regulations and CSOS preferential procurement policy.
- 9.2 All pricing must be in SA Rands and fixed for the duration of the contract. Bidders must specify the items that are subject to exchange rate fluctuations.

THE SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER.	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM) TO BE COMPLETED BY THE ORGAN OF STATE.	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM) TO BE COMPLETED BY THE TENDERER.
EME or QSE owned by 51% or more black person women; EME or QSE owned by 51% or more black person youth; EME or QSE owned by 51% or more black persons living with a disability; EME or QSE owned by 51% or more black person who is military veteran.	17	
EME or QSE owned by 51% or more black people living in rural or underdeveloped areas or townships.	1	
EME or QSE Co-operative owned by 51% or more black people	1	
EME or QSE is owned by 51% or more black people in general, with a focus in order of priority on Africans, Indians, and Coloureds.	1	
Total Points for Price and Specific Goals		

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

9.3 PRICING SCHEDULE

	DESCRIPTION	QTY	UNIT PRICE (PRICE PER PAGE)	TOTAL
1.	CSOS Digital Transformation Assessment Document	1	R	R
2.	CSOS Digital Transformation Strategy Document	1	R	R
3.	CSOS Digital Transformation Strategy Implementation Plan	1	R	R
4.	Other (Bidder to specify)		R	R
	Subtotal		R	R
	VAT @ 15% (if applicable)		R	R
	Total inclusive of VAT		R	R

Signature (Bidder)

Date

10 TIMELINE OF THE BID PROCESS

- 10.1 The validity period of RFQ's and the withdrawal of offers, after the closing date and time, is ninety (90) days.

11 DURATION OF THE CONTRACT

- 11.1 The development services are once-off, but the supplier must guarantee their work for four (4) months.

12 PROJECT MANAGEMENT RESPONSIBILITY

- 12.1 The CSOS Project Manager's responsibilities will include:
- 12.1.1 Providing the service provider with all appropriate advice and information pertinent to this project's success and assisting in setting up meetings with key management staff.

13 SERVICE PROVIDER RESPONSIBILITIES

- 13.1 After signing an agreement to conduct the full scope of work for the CSOS, the specialist service provider will provide a line-item budget detailing each cost.
- 13.2 The service provider will sign a Service Level Agreement to ensure CSOS information and intellectual property confidentiality.
- 13.3 The service provider must abide by the CSOS's policies, procedures, and Code of Conduct when performing work on its behalf.

14 SUPPLIER DUE DILIGENCE

- 14.1 CSOS reserves the right to conduct supplier due diligence before the final award or during the contract period. This may include site visits, confirmation of financial stability and requests for additional information.

15 RESPONSE FORMAT (SUBMISSION OF PROPOSAL)

- 15.1 The proposals must be submitted in the prescribed format. Standard bidding documents attached with Terms of Reference must be completed in full.
- 15.2 Failure to comply with the mandatory requirements will result in your RFQ being disqualified

16 FRONTING

- 16.1 The government supports the spirit of Broad-Based Black economic empowerment. It recognises that real empowerment can only be achieved through individuals and businesses conducting themselves by the Constitution in an honest, fair, equitable, transparent, and legally compliant manner. Against this background, the Government condemns any form of fronting.
- 16.2 The Government, in ensuring that bidders honestly conduct themselves, will, as part of the quotation evaluation processes, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in quotation documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry/investigation, the onus will be on the Bidder/contractor to prove that fronting does not exist. Please do so within 14 days from the date of notification to ensure the quotation/contract is valid. It may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies CSOS may have against the Bidder / Contractor concerned.

17 CONTACT AND COMMUNICATION

- 17.1 A nominated bidder(s) official can make written enquiries to the specified person, Ms Nonyameko Ngxeke, via email: nonyameko.ngxeke@csos.org.za Or Tel:010 593 0533. Further information regarding Supply Chain Management matters can be emailed to Ms Nonkululeko Mthethwa at nonkululeko.mthethwa@csos.org.za or Tel: 010 593 0533
- 17.2 The delegated office of CSOS may communicate with Bidder(s) where clarity is sought in the proposal.
- 17.3 Any communication with an official or a person acting in an advisory capacity for CSOS regarding the quotation between the closing date and the award of the quotation by the Bidder(s) is discouraged.
- 17.4 All communication between the Bidder(s) and CSOS must be done in writing.
- 17.5 Whilst all due care has been taken in connection with the preparation of this quotation, CSOS makes no representations or warranties that the content of the quotation or any information communicated to or provided to Bidder(s) during the bidding process is, or will be, accurate, current or complete. CSOS and its employees and advisors will not be liable for any information communicated that may not be accurate, current, or complete.

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

- 17.6 If Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this quotation or any other information provided by CSOS (other than minor clerical matters), the Bidder(s) must promptly notify CSOS in writing of such discrepancy, ambiguity, error or inconsistency to allow CSOS to consider what corrective action is necessary (if any).
- 17.7 Any actual discrepancy, ambiguity, error or inconsistency in the quotation or any other information provided by CSOS will, if possible, be corrected and supplied to all Bidder(s) without attribution to the Bidder(s) who provided the written notice.
- 17.8 All persons (including bidder(s) obtaining or receiving the quotation and any other information in connection with the quotation or the tendering process must keep the contents of the quotation and other such information confidential and not disclose or use the information except as required for developing a proposal in response to this quotation.

18 SUBMISSION OF PROPOSALS

- 18.1 Proposal documents should be sent to quotations1@csos.org.za on or before the closing date and time **(12 March 2026) at 12:00PM**).

SBD 3.3
PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:

BID NO: RFQ020-2026: TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE DEVELOPMENT OF A DIGITAL TRANSFORMATION STRATEGY FOR A PERIOD OF 4 MONTHS.

CLOSING TIME 12:00 PM ON 12 MARCH 2026

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO <u>TAX</u>	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VALUE ADDED</u>
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1. Services must be quoted in accordance with the attached terms of reference.

Total cost of the assignment (R inclusive VAT)

R.....

PRICING SCHEDULE

	DESCRIPTION	QTY	UNIT PRICE (PRICE PER PAGE)	TOTAL
1.	CSOS Digital Transformation Assessment Document	1	R	R
2.	CSOS Digital Transformation Strategy Document	1	R	R
3.	CSOS Digital Transformation Strategy Implementation Plan	1	R	R
4.	Other (Bidder to specify)		R	R
	Subtotal		R	R
	VAT @ 15% (if applicable)		R	R
	Total inclusive of VAT		R	R

Signature (Bidder)

Date

The financial proposal for this assignment should cover for all assignment activities as per terms of reference

2. Period required for commencement with project after acceptance of bid

3. Are the rates quoted firm for the full period? Yes/No

4. If not firm for the full period, provide details of the basis on which Adjustments will be applied for, for example consumer price index.

Technical enquiries regarding bidding procedures may be directed to:

Nonyameko Ngxeke

Tell: (010) 593 0533

E-mail address: nonyameko.ngxeke@csos.org.za

Supply Chain queries may be directed to:

Nonkululeko Mthethwa

Tell: (010) 593 0533

Email: quotations1@csos.org.za

PLEASE REFER TO THE ATTACHED TERMS OF REFERENCE FOR MORE INFORMATION.

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 interest¹ 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

2.2 Do you, or any person connected with the bidder, have a relationship

¹ 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.

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 consortium² 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

² 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.

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.

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) Either 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.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

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.

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

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 + \frac{80/20 (Pt - Pmax)}{Pmax} \right) \quad \text{or} \quad Ps = 90 \left(1 + \frac{90/10 (Pt - Pmax)}{Pmax} \right)$$

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 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1. EME or QSE owned by 51 % or more black woman; or more black person who are youth; or more black person living with disabilities; or more black person who is a military veteran	17	
2. EME or QSE owned by 51 % black people living in rural or underdeveloped areas or township	1	
3. EME or QSE Co-operative owned by 51% or more black people	1	
4. EME or QSE owned by 51% or more black people in general, with focus in order of priority on africans, Indians and coloureds.	1	

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:
