



T12/07/16

**REQUEST FOR PROPOSALS FOR THE
PROVISION OF MARKETING AND
PUBLIC RELATIONS SERVICES**

**BID CLOSING DATE: WEDNESDAY, 27
JULY 2016 AT 12:00 NOON**

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SECTION 1: GENERAL CONDITIONS OF BID

1. Proprietary Information

Industrial Development Corporation of SA Ltd (IDC) considers this Request for Proposal (RFP) and all related information, either written or verbal, which is provided to the respondent, to be proprietary to IDC. It shall be kept confidential by the respondent and its officers, employees, agents and representatives. The respondent shall not disclose, publish, or advertise this RFP or related information to any third party without the prior written consent of IDC.

2. Enquiries

- 2.1 All communication and attempts to solicit information of any kind relative to this RFP should be channelled **in writing** to:

Name:	<u>Ms Mmanthudi Mosupyoe</u>
Telephone Number:	<u>+27 11 269 3709</u>
Email address:	<u>mmanthudim@idc.co.za</u>

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 19 July 2016**.
- 2.3 The enquiries will be consolidated and IDC will issue one response and such response will be posted, within two days after the last day of enquiries, onto the IDC website (www.idc.co.za) under tenders i.e. next to the same RFP document.
- 2.4 The IDC may respond to any enquiry in its absolute discretion and the bidder acknowledges that it will have no claim against the IDC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

3. Bid Validity Period

Responses to this RFP received from bidders will be valid for a period of 120 days counted from the bid closing date.

4. Instructions on submission of Bids

- 4.1 Bids should be submitted in duplicate (2 hard copies) and one electronic copy (on CD) in PDF format all bound in a sealed envelope endorsed, **T12/07/16: Request for Proposal for the provision of Marketing and Public Relations Services**. The sealed envelope must be placed in the bid box at the Main Reception area of the IDC Building, 19 Fredman Drive Sandton by no later than **12:00 noon on Wednesday, 27 July 2016**.
- 4.2 Bids must be submitted in the prescribed response format, herein reflected as **Response Format**.
- 4.3 The bid closing date, bidder name and the return address must also be endorsed on the envelope.
- 4.4 If a courier service company is being used for delivery of the bid response, the bid description must be endorsed on the delivery note/courier packaging and the courier must ensure that documents are placed / deposited into the bid box. **The IDC will not**

be held responsible for any delays where bid documents are handed to the IDC Receptionist.

- 4.5 No bid response received by telegram, telex, email, facsimile or similar medium will be considered.
- 4.6 Where a bid response is not in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **It is the IDC's policy not to consider late bids for tender evaluation.**
- 4.7 Amended bids may be sent in an envelope marked "Amendment to bid" and should be placed in the bid box before the closing time.

5. Preparation of Bid Response

- 5.1 All the documentation submitted in response to this RFP must be in English.
- 5.2 The bidder is responsible for all the costs that it shall incur related to the preparation and submission of the bid document.
- 5.3 Bids submitted by bidders which are, or are comprised of companies must be signed by a person or persons duly authorised thereto by a resolution of the applicable Board of Directors, a copy of which Resolution, duly certified, must be submitted with the bid.
- 5.4 The bidder should check the numbers of the pages of its bid to satisfy itself that none are missing or duplicated. No liability will be accepted by IDC in regard to anything arising from the fact that pages of a bid are missing or duplicated.
- 5.5 A valid tax clearance certificate must be included in the bid response, or proof of application endorsed by SARS in this regard.

6. Supplier Performance Management

Supplier Performance Management is viewed by the IDC as a critical component in ensuring value for money acquisition and good supplier relations between the IDC and all its suppliers.

The successful bidder shall upon receipt of written notification of an award, be required to conclude a Service Level Agreement (SLA) with the IDC, which will form an integral part of the supply agreement. The SLA will serve as a tool to measure, monitor and assess the supplier's performance and ensure effective delivery of service, quality and value-add to IDC's business.

Successful bidders will be required to comply with the above condition, and also provide a scorecard on how their product / service offering is being measured to achieve the objectives of this condition.

7. Supplier Development

The IDC promotes enterprise development. In this regard, successful bidders may be required to mentor SMMEs and/ or Youth-Owned businesses. The implications of such arrangement will be subject to negotiations between the IDC and the successful bidder.

8. IDC's Rights

- 8.1 The IDC is entitled to amend any bid conditions, bid validity period, RFP specifications, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the IDC have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the IDC's website under the relevant tender information. All prospective bidders should therefore ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 8.2 The IDC reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the IDC.
- 8.3 The IDC reserves the right to award this bid as a whole or in part.
- 8.4 The IDC reserves the right to conduct site visits at bidder's corporate offices and / or at client sites if so required.
- 8.5 The IDC reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the **National Treasury Instruction 01 of 2013/2014: Cost Containment Measures**, where relevant.
- 8.6 The IDC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the IDC to conduct background checks, including FICA verification, on the bidding entity and any of its directors / trustees / shareholders / members.

9. Undertakings by the Bidder

- 9.1 By submitting a bid in response to the RFP, the bidder will be taken to offer to render all or any of the services described in the bid response submitted by it to the IDC on the terms and conditions and in accordance with the specifications stipulated in this RFP document.
- 9.2 The bidder shall prepare for a possible presentation should IDC require such and the bidder shall be notified thereof in good time before the actual presentation date. Such presentation may include a practical demonstration of products or services as called for in this RFP.
- 9.3 The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the IDC during the bid validity period indicated in the RFP and calculated from the bid closing hour and date such offer and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 9.4 The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.

- 9.5** The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with IDC, as the principal(s) liable for the due fulfilment of such contract.
- 9.6** The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with its bid will become IDC property unless otherwise stated by the bidder/s at the time of submission.

10. Reasons for disqualification

- 10.1** The IDC reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder, however the bidder will be notified in writing of such disqualification:
- 10.1.1 bidders who do not submit a valid and original Tax Clearance Certificate or proof of application of such as endorsed by SARS **on the closing date and time of the bid**;
- 10.1.2 bidders who submit incomplete information and documentation according to the requirements of this RFP document;
- 10.1.3 bidders who submit information that is fraudulent, factually untrue or inaccurate information;
- 10.1.4 bidders who receive information not available to other potential bidders through fraudulent means;
- 10.1.5 bidders who do not comply with **mandatory requirements** if stipulated in the RFP document;
- 10.1.6 bidders who fail to comply with FICA requirements;

11. Local Production and Content

The IDC promotes Local Production and Content. In the case of designated sectors, only locally produced goods, services or works or locally manufactured goods, with a stipulated minimum threshold for local production and content will be considered. IDC reserves the right at its sole discretion to set minimum thresholds for sectors which may not have been declared as designated sectors by the dti in an effort to stimulate local production and content where relevant.

12. Response Format (Returnable Schedules)

Bidders shall submit their bid responses in accordance with the response format specified below (each schedule must be clearly marked):

- 12.1 Cover Page:** (the cover page must clearly indicate the RFP reference number, bid description and the bidder's name)
- 12.2 Schedule 1:**
- 12.2.1 Executive Summary (explaining how you understand the requirements of this RFP and the summary of your proposed solution)
- 12.2.2 Annexure 1 of this RFP document (duly completed and signed)
- 12.3 Schedule 2**

- 12.3.1 Original and valid Tax Clearance Certificate(s) (TCC);
- 12.3.2 Originally certified copies of bidder's CIPC company registration documents listing all members with percentages, in case of a CC.
- 12.3.3 Copy of Board Resolution, duly certified;
- 12.3.4 Originally certified copy of ID document for the Company Representative
- 12.3.5 Annexure 2 of this RFP document (duly completed and signed);
- 12.3.6 Annexure 3 of this RFP document (duly completed and signed);
- 12.3.7 Annexure 4 of this RFP document (duly completed and signed);
- 12.3.8 Latest Audited Financial Statement
- 12.3.9 B-BBEE verification certificate indicating the contribution level of the bidding entity. An Exempted Micro Enterprises (EME) with an annual turnover less than R10 million, is only required to obtain a sworn affidavit confirming the annual total revenue and level of black ownership. An EME that has at least 75% black beneficiaries qualifies for elevation to "Level One Contributor" and an EME that has at least 51% black beneficiaries qualifies for elevation to "Level Two Contributor". Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.
Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above (12.3.1-12.3.7) must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).
- 12.3.10 Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)
- 12.4 Schedule 3:**
 - 12.4.1 Response to Section 2 of this document, in line with the format indicated in this RFP document.
 - 12.4.2 Annexure 5 of this RFP document, duly completed and signed
 - 12.4.3 Annexure 6 of this RFP document, duly completed and signed
- 12.5 Schedule 4: Price Proposal (response to Section 3 of this RFP document) (Must be submitted in a separate envelope within the sealed envelope of the bid)**
- 12.6 One (1) CD with all Schedules listed above, also included in the sealed envelope of the bid**

13. Evaluation Criteria and Weightings

Bids shall be evaluated in terms of the following process:

- 13.1 Phase 1: Initial Screening Process:** During this phase, bid responses will be reviewed for purposes of assessing compliance with RFP requirements including the general bid conditions, which requirements include the following:
- Submission of a valid Tax Clearance Certificate as referenced in 12.3.1 above
 - Submission of Company Registration Forms as referenced 12.3.2 above
 - Submission of ID copy for the Company Representative as referenced in 12.3.3 above
 - BEE Status Certification as referenced in 12.3.9 & 12.3.10 above
 - Completion of all Standard Bidding Documents and other requirements, as reflected in this RFP, which covers the following:
 - Section 2: Statement of compliance with the Functional Evaluation Criteria for this RFP
 - Section 3: Cost Proposal and Price Declaration Form
 - Annexure 1: Acceptance of Bid Conditions
 - Annexure 2: Supply Chain Management Questionnaire
 - Annexure 3: Declaration of Interest
 - Annexure 4: Shareholders' Information/ Group Structure
 - Annexure 5: Bidders Experience & Project Team
 - Annexure 6: BEE Commitment Plan

Failure to comply with the requirements assessed in Phase 1 (compliance), may lead to disqualification of bids.

13.2 Phase 2: Technical/ Functionality Evaluation

Bid responses will be evaluated in accordance with the Functional criteria as follows:

13.2.1 **Mandatory Functional/ Technical Requirements**

All bid responses that do not meet the Mandatory Functional Requirements will be disqualified, and will not be considered for further evaluation on the Other Functional Requirements. The Mandatory Functional Requirements are stated in section 2 of this RFP document.

Failure to comply with the Mandatory Functional Requirements assessed in phase 2 may lead to disqualification of bids.

13.2.2 **Other Functional/ Technical Requirements – Category 1: Aadvertising (above-the-line and below-the-line) and Digital Marketing**

With regard to the other Functional Requirements, the following criteria (set out in more detail in section 2 of this RFP document) and the associated weightings will be applicable:

ELEMENT	WEIGHT
Proposal - Advertising	35
Proposal - Digital Marketing	20
Experience, skills, qualifications of the project team	30
Presentations	15
TOTAL	100%

Note: Bidders who score 68 points out of 85 points (80%) or more in total in functional/technical requirements will be required to further provide presentation at the IDC head office in Sandton for further evaluation purposes.

All bids that fail to achieve the minimum overall qualifying score of 80% other functional/technical requirements including the presentation will not be considered for further evaluation on Price and BEE

13.2.3 **Other Functional/ Technical Requirements – Category 2: Strategic Public Relations**

With regard to the other Functional Requirements, the following criteria (set out in more detail in section 2 of this RFP document) and the associated weightings will be applicable:

ELEMENT	WEIGHT
Bidder's Proposal	30
Experience, skills, qualifications of the project team	45
Presentations	25
TOTAL	100%

Note: Bidders who score 60 points out of 75 points (80%) or more in total in functional/technical requirements will be required to further provide presentation at the IDC head office in Sandton for further evaluation purposes.

All bids that fail to achieve the minimum overall qualifying score of 80% other functional/technical requirements including the presentation will not be considered for further evaluation on Price and BEE

13.3 Phase 3: Preference Point System

All bids that achieve the minimum qualifying score for Functionality (acceptable bids) will be evaluated further in terms of the preference point system, as follows: **This will be applicable to both categories)**

CRITERIA	POINTS
Price	90
B-BBEE	10
TOTAL	100 points

14. Promotion of Emerging Black owned Service Providers

It is the IDC's objective to promote transformation in the marketing and public relations field of work and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this tender would be undertaken by black owned entities. To give effect to this requirement, bidders are required to submit a partnership / subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring listed in 13.3.

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

1. Special instructions to bidders

- 1.1 Should a bidder have reason to believe that the Functional Requirements are not open / fair and/or are written for a particular service provider; the bidder must notify IDC Procurement within five (5) days after publication of the RFP.
- 1.2 Bidders shall provide full and accurate answers to the questions posed in this RFP document, and, where required explicitly state either “Comply/Not Comply” regarding compliance with the requirements. Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/ technical requirements; failure to substantiate may lead to the bidder being disqualified. All documents as indicated must be supplied as part of the bid response.
- 1.3 Failure to comply with Mandatory Requirements may lead to the bidder being disqualified.

2. Background Information

The Industrial Development Corporation (IDC) seeks to appoint an integrated marketing communication agency/ agencies, or a specialist agency per discipline, to handle the following functions relating to its corporate brand:

- Advertising (above-the-line and below-the-line) and Digital Marketing
- Strategic Public Relations

Bidders may choose to bid for one or both categories i.e. advertising (above-the-line and below-the-line) and Digital Marketing and/or Strategic Public Relations. The bidder must indicate, in the table below, with a **cross (X)** the category the bidder is bidding for:

SERVICE CATEGORIES	PLEASE CROSS (X)
Advertising (above-the-line and below-the-line) and Digital Marketing	
Strategic Public Relations	

Note: Each category has its own evaluation criteria. Bidders must ensure that they provide the required response/ information for each category the bidder is bidding for.

The IDC is a multi-faceted corporation whose activities span various sectors (14 sectors) of the economy. Thus the need exist for an agency/agencies who have the skills and capacity to deliver quality work within normally very tight timelines for the IDC to maintain its corporate marketing objectives. For more information on the IDC business, please visit our website www.idc.co.za

3. Scope of Work

The appointed Service Provider/s will be required to provide services as per the categories below:

3.1 Category 1: Advertising (above-the-line and below-the-line) and Digital Marketing

The IDC seeks to appoint an agency to provide, but will not be limited to, the following services:

- a. Development of advertising and communication strategies;
- b. Advertising ideas, plans, programmes and campaigns;
- c. Production management services (Above-the-line and Below-the-line);
- d. Creative strategy, creative conceptualisation, copy and layout and finished art;
- e. Employee Engagement, Change Management and Behaviour Change Campaigns to build internal brand ambassadors;
- f. Photography and video production services;
- g. Formulation of digital (including social media) marketing strategy;
- h. Development of digital marketing implementation plan;
- i. Website design and content development and management services.
- j. Search Engine Optimization

3.2 Category 2: Strategic Public Relations (PR)

The IDC seeks to appoint a Strategic Public Relations (PR) agency to provide, but will not be limited to, the following services:

- a. Development and implementation of a reputation management strategy and plan;
- b. Development and implementation of a PR strategy and plan;
- c. Development and implementation of a stakeholder engagement strategy and plan;
- d. Speech writing;
- e. Straight-forward news writing (including opinion pieces and editorials)
- f. Copy editing;
- g. Media training;
- h. Identifying and pitching stories ideas to journalists;
- i. Development and management of IDC media database;
- j. Organising media site visits; etc.

4. Contract Term

The appointed service provider(s) may be required to start immediately after signing the contract and to provide the services for a period of two (2) years comprising of an initial base year with a further 1 year option to extend, subject to an annual review of the service provider's performance and attainment of transformation goals under the Amended B-BBEE Codes of good practice. The IDC reserves the right to extend the term of the contract for a longer period.

5. Technical Evaluation Criteria: Category 1 - Advertising (above-the-line and below-the-line) and Digital Marketing

5.1 Mandatory Technical Requirements

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.

5.1.1 CLIENT REFERENCE AND SAMPLES	Comply	Not Comply
The bidder must provide a sample of a 'high-level' strategy and implementation plan (developed for previous clients). The strategy and plan must clearly indicate how the bidder supported its client/s meet their business objectives. Bidders must also provide samples of marketing material/creative developed, bearing in mind the size of the sample to be provided as the capacity of our tender box is restricted in terms of size. The IDC prefers that the bidders provide electronic proof of sample/s (i.e. on CDs etc.). Please provide client contact details as well.		
Substantiate /comments		

5.1.2 CLIENT OPERATIONS AND CAPACITY	Comply	Not Comply
The Bidder must run its operations from a site that is presentable and conducive to service the IDC effectively. The IDC will validate compliance in this regard and therefore reserves the right to conduct site visits at such centres of operations and bidders are required to furnish their physical addresses in this regard.		
Substantiate /comments		

5.2 Other Technical Requirements

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.

5.2.1 Advertising Proposal

The service provider must indicate their ability to do the following and to substantiate as required:	Comply	Partial	Non Comply	Substantiation
a) Provide strategic business input and development of advertising and communication strategies. Indicate the approach you would follow to provide strategic business input to the IDC's Marketing and Communications Strategy.				

The service provider must indicate their ability to do the following and to substantiate as required:	Comply	Partial	Non Comply	Substantiation
<p>b) Provide Advertising ideas, plans, programmes and campaigns.</p> <p>Indicate the approach you would follow in this regard.</p>				
<p>c) Provide creative strategy, creative conceptualisation, copy and layout and finished art. Indicate what systems and processes you have in place to execute in this regard.</p>				
<p>d) Provide Media Strategy Planning along with evaluation of all advertising media.</p> <p>Indicate booking capability along with the approach to ensure optimal value to the IDC in this regard.</p>				
<p>e) Provide Production Management services (Above-the-line and Below-the-line).</p> <p>Substantiate on how this would be done.</p>				
<p>f) Provide Employee Engagement, Change Management and Behaviour change campaigns to build internal brand ambassadors.</p> <p>Indicate the approach to create value in this regard.</p>				
<p>g) Provide photography and video production services. The bidder must have national network to provide these services.</p> <p>Indicate the network across the 9 provinces.</p>				
<p>h) A creative pitch is not being requested. However, agencies need to indicate the steps they would follow to devise a comprehensive strategy that clearly shows how they intend to position the IDC. Agencies are also required to indicate their knowledge and understanding of the IDC's business and how they intend assisting the IDC in reaching its Marketing and Communications objectives.</p>				
<p>i) Quality control – indicate your production quality control process and key success factors in this regard.</p>				
<p>j) Business focus and strategic direction – what are the main service offerings that differentiate the agency.</p>				
<p>k) Indicate how you measure the success of a campaign.</p>				
<p>l) Indicate your capability to deliver on critical and unplanned projects under stringent timelines.</p>				

5.2.2 Digital Marketing

The service provider must indicate their ability to do the following and to substantiate as required:	Comply	Partial	Non Comply	Substantiation
a) Provide digital (including social media) marketing strategy formulation. Please indicate approach to create value in this regard. The bidder must provide at least three examples of previous work done.				
b) Provide digital marketing implementation plan in support of the strategy. Indicate the approach you would follow in this regard.				
c) Provide website design and content development and management services. Please indicate systems and processes to assist in creating value in this regard.				

5.2.3 Team Experience (Advertising, Internal Communications and Digital Marketing)

The service provider must indicate their ability to do the following and to substantiate as required:	Comply	Partial	Non Comply	Substantiation
a) Provide focussed account and project management to the IDC. Please indicate what approach and structure is in place to support this requirement by providing details of the technical and support team.				
b) Indicate your staff retention strategy to ensure relevant skills are retained to manage the IDC account.				
c) The number of years of experience/ involvement in development finance/ financial services marketing communication based on the combined experience of the project team (team proposed for the IDC account).				

5.2.4 Presentations

Shortlisted bidders will be required to provide a presentation to the IDC team on work done previous i.e. case study. The presentation must cover but not limited to the following:

Presentations	Maximum points
a) Description of the case study/ scenario - campaign whose main objective was to increase sale and brand positioning.	2
b) Approach followed to develop the strategy to support the objectives.	5
c) Execution of the strategy	5
d) Success factors and how the success rate was measured	3

Note: The information is to be shared for presentation purposes is not a pitch.

6. Technical Evaluation Criteria: Category 2 – Strategic Public Relations

6.1 Mandatory Technical Requirements

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.

6.1.1 CLIENT REFERENCE AND SAMPLES	Comply	Not Comply
The bidder must provide a sample of a 'high-level' strategy and implementation plan (developed for previous clients). The strategy and plan must clearly indicate how the bidder supported its client/s meet their business objectives. Bidders must also provide samples of marketing material/ creative developed, bearing in mind the size of the sample to be provided as the capacity of our tender box is restricted in terms of size. The IDC prefers that the bidders provide electronic proof of sample/s (i.e. on CDs etc). Please provide client contact details as well.		
Substantiate /comments		

6.1.2 CLIENT OPERATIONS AND CAPACITY	Comply	Not Comply
The Bidder must run its operations from a site that is presentable and conducive to service the IDC effectively. The IDC will validate compliance in this regard and therefore reserves the right to conduct site visits at such centres of operations and bidders are required to furnish their physical addresses in this regard.		
Substantiate /comments		

6.2 Other Technical Requirements

The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response in the space provided below. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.

6.2.1 Public Relations

The PR agency must demonstrate, in designing the following strategies, its understanding of IDC's mandate and business objectives across its supported sectors.	Comply	Partial	Non Comply	Substantiation
a) Development and implementation of a reputation management strategy and plan. Indicate the approach you would follow to in this regard.				
b) Development and implementation of a PR strategy and plan. Indicate the approach you would follow to in this regard.				

The PR agency must demonstrate, in designing the following strategies, its understanding of IDC's mandate and business objectives across its supported sectors.	Comply	Partial	Non Comply	Substantiation
c) Development and implementation of a stakeholder engagement strategy and plan. Indicate the approach you would follow in this regard.				
d) Speech writing. The bidder must provide the samples of the previous work in this regard.				
e) Straight-forward news writing (including opinion pieces, advertorials). The bidder must provide the samples of the previous work in this regard.				
f) Identifying and pitching stories ideas to journalists. The bidder must indicate the approach based on IDC's mandate and objectives.				

6.2.2 Team Experience (Public Relations)

The service provide must indicate their ability to do the following and to substantiate as required:	Comply	Partial	Non Comply	Substantiation
a) Provide focussed account and project management to the IDC. Please indicate what approach and structure is in place to support this requirement by providing details of the team.				
b) Indicate your staff retention strategy to ensure relevant skills are retained to manage the IDC account.				
c) The number of years in PR within the development finance/ financial services sector based on the combined experience of the project team (team proposed for the IDC account).				

6.2.3 Presentations

Shortlisted bidders will be required to provide a presentation to the IDC team on work done previous i.e. case study. The presentation must cover but not limited to the following:

Presentations	Maximum points
a) Description of the case study/scenario - campaign whose main objective was to position the brand in the market.	2
b) Approach followed to develop the strategy to support the objectives.	10
c) Strategy implementation plan.	10
d) Success factors and how the success rate was measured	3

Note: The information is to be shared for presentation purposes is not a pitch.

SECTION 3: PRICE PROPOSAL

SECTION 3: Cost Proposal

- 1 Please indicate your total bid price here: Category 1 R..... (compulsory)
Category 2 R..... (compulsory)

2 **NOTE: All prices must be VAT exclusive and must be quoted in South African Rand (ZAR).**

- 3 Are the rates quoted firm for the full period of the contract?

YES	NO
-----	----

Important: If not firm for the full period, provide details of the basis on which price adjustments shall be applied e.g. CPI etc.

- 4 All additional costs associated the bidder's offer must be clearly specified and included in the Total Bid Price.

5

Is the proposed bid price linked to the exchange rate?	Yes	No
<i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i>		

6

Payments will be linked to specified deliverables after such deliverables have been approved by the IDC. Payments will be made within 30 days from date of invoice.	Comply	Not Comply

7

The IDC reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 01 of 2013/2014: Cost Containment Measures which took effect from 01 January 2014, where relevant.	Comply	Not Comply
The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.		
Substantiate / Comments		

8. COSTING MODEL

8.1.1 Category 1: Advertising (above-the-line and below-the-line) and Digital Marketing

Bidders are required to quote on a retainer fee that is based on 422 hours per month as per the table below:

Table A: Advertising

Agency Resource	Hours per resource per month	Hourly Rates (VAT Excl.)	Monthly Fee (VAT Excl.)
Creative			
Executive Creative Director	6		
Creative Director	32		
Art Director	40		
Designer	48		
Copy writer - Senior	48		
Sub-total: Creative work			

Agency Resource	Hours per resource per month	Hourly Rates (VAT Excl.)	Monthly Fee (VAT Excl.)
Operations			
Production: BTL only	32		
Traffic	20		
Sub-total: Traffic & Production			
Account Management			
Executive Oversight	26		
Account Manager	160		
Sub-total: Account Management			
Strategy Development			
Strategy Director - Senior	10		
Sub-total: Strategy			
Sub Total Monthly Retainer - Advertising (Year 1)			

Table B: Digital Marketing

Bidders are required to quote on a retainer fee as per the table below:

Service Description	Monthly Fee (Excl. VAT)
Web management services	
Web hosting	
Search Engine Optimization	
Sub Total Monthly Retainer fee (Excl. VAT)	

Table C: Summary of Category 1 - Advertising (above-the-line and below-the-line) and Digital Marketing Retainer fee for two (2) years

DESCRIPTION	Monthly Fee (Excl. VAT)	Annual Fee (Excl. VAT)
Table A + Table B Monthly Retainer Fee	Year 1	
	Year 2	
Total Bid Price Category 1 (Excl. VAT)		

Table D: Ad-hoc Services

Bidders are also requested to provide cost for production services that may be required on ad-hoc basis as per the table below. The cost must be fixed for the first year after contracting.

Cost Items	Unit of measure	Cost per unit
Typesetting/Typography	Per hour	
Illustration of Artwork	Per hour	
Rendering (1hour per A4 on average)	A4	
Retrieval of Disk Artwork (15min per pic on average)	1/4 hour	
Placing per PIC (15 min per pic on average)	1/4 hour	
Digital Download	1/4 hour	
Retouching	Per hour	

Cost Items	Unit of measure	Cost per unit
Laser Proof-Colour	A4	
Laser Proof -Colour	A3	
Electronic Assembly	Per DTP hour	
Contract Proof- Digital e.g. Sherpa/Epson	A5	
Contract Proof- Digital e.g. Sherpa/Epson	A4	
Contract Proof- Digital e.g. Sherpa/Epson	A3	
Contract Proof- Digital e.g. Sherpa/Epson	A2	
Resizing	Per hour	
Library of Images (Archiving/storage of)	Per image	
Scanning	A5	
Scanning	A4	
Scanning	A3	
Scanning	A2	
Dispatch, PDF, Quickcut Adsend -Colour	A5	
Dispatch, PDF, Quickcut Adsend -Colour	A4	
Dispatch, PDF, Quickcut Adsend -Colour	A3	
Dispatch, PDF, Quickcut Adsend -Colour	A2	
Dispatch, PDF, Quickcut Adsend -Colour	A1	
CD's (excluding time to retrieve artwork)	Per CD	
DVD's (excluding time to retrieve artwork)	Per DVD	
Photoshop	Per image	
DTP	Per hour	
Proofreading	Per hour	

Note: Bidders are required to include all other production services that may be required in the table above.

8.1.2 Category 2: Public Relations (PR)

Bidders are required to quote on a retainer fee that is based on 58 hours per month as per the table below:

Table A

Agency Resource	Hours per resource per month	Hourly rates	Fee charge
PR Strategy	2		
PR Specialist - Senior	40		
PR Specialist- Junior	16		
Total Monthly Retainer (Excl. VAT)			

Table B: Summary of Category 2 Retainers Fee for a period of two years

DESCRIPTION		Monthly Fee (Excl. VAT)	Annual Fee (Excl. VAT)
Monthly Retainer Fee	Year 1		
	Year 2		
Total Bid Price Category 2 (Excl. VAT)			

Table C: Ad-hoc Services

Bidders are also requested to provide cost for production services that may be required on ad-hoc basis as per the table below. The cost must be fixed for the first year after contracting.

Cost Items	Unit of measure	Cost per unit
Corporate Communication	Per hour	
Stakeholder Relations	Per hour	
Press Releases	Per release	
Press Statements	Per statement	
Crises Communication Elements	Per hour	
Advertorials	Per advertorial	
Editorials/ opinion pieces	Per editorial	

Note: Bidders are required to include all other production services that may be required in the table above.

Price Declaration Form

Dear Sir,

Having read through and examined the Request For Proposal (RFP) Document, RFP no. **T12/07/16**, the General Conditions, and all other Annexures to the RFP Document, we offer for the provision of Marketing and Public Relations Services to the IDC at the following total amount:

CATEGORY 1

R..... (Excluding VAT)

In words

R..... (Excluding VAT)

CATEGORY 2

R..... (Excluding VAT)

In words

R..... (Excluding VAT)

We confirm that this price covers all activities associated with the service, as called for in the RFP document. We confirm that IDC will incur no additional costs whatsoever, other than in respect of VAT, over and above this amount in connection with the provision of this service.

We undertake to hold this offer open for acceptance for a period of 120 days from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence with the provision of the required service when required to do so by the IDC.

We understand that you are not bound to accept the lowest or any offer, and that we must bear all costs which we have incurred in connection with preparing and submitting this bid.

We hereby undertake for the period during which this bid remains open for acceptance, not to divulge to any persons, other than the persons to whom the bid is submitted, any information relating to the submission of this bid or the details therein except where such is necessary for the submission of this bid.

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF: COMPANY NAME

Tel No

Fax No

Cell No

SECTION 4: ANNEXURES

Annexure 1 – Acceptance of Bid Conditions and Bidder’s Details

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised Signatory _____

Position of Authorised Signatory _____

By signing above the bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this RFP.

[Note to the Bidder: The Bidder must complete all relevant information set out below.]

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

Bidders are required to be registered on the Central Supplier Database (CSD) of National Treasury. Failure to submit the requested information may lead to disqualification. Bidders are therefore required to submit as part of this proposal both their CSD supplier number and CSD unique registration reference numbers below:	
Supplier Number	
Unique registration reference number	

BIDDING STRUCTURE

Indicate the type of Bidding Structure by marking with an ‘X’:	
Individual Bidder	
Joint Venture/ Consortium	
Prime Contractor with Sub Contractors	
Other	

REQUIRED INFORMATION

If Individual Bidder:	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	

If Individual Bidder:	
Fax Number	
Email address	
Postal Address	
Physical Address	

If Joint Venture or Consortium, indicate the following for each partner:	
Partner 1	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	
Partner 2	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	

If bidder is a Prime Contractor using Sub-contractors, indicate the following:	
Prime Contractor	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Sub contractors	
Name of Company	
Company Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Subcontracted work as a % of the total value of the contract	

Annexure 2 - Supply chain management practices questionnaire

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

[Note to the Respondent: the Respondent must complete the information set out below. If the Respondent requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

The bidder must complete the following questionnaire.

Bidder's past supply chain management practices:

Item	Question	Yes	No
3.1	<p>Is the Bidder or any of its directors listed on the South African National Treasury's database as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this database were informed in writing of this restriction by the South African National Treasury after the <i>audi alteram partem</i> rule was applied).</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.2	<p>Is the Bidder or any of its directors listed on the Register for Bid Defaulters in terms of section 29 of the <i>Prevention and Combating of Corrupt Activities Act</i> No 12 of 2004?</p> <p>To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Bid Defaulters" or submit your written request for a hard copy of the Register to facsimile number +27123265445.</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.3	<p>Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>

Item	Question	Yes	No
	If so, provide particulars:		
3.4	Does the Bidder relate to any IDC employee or part of IDC current or past staff (employee) establishment?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If so, provide particulars:		
3.5	Was any contract between the Bidder and any organ of state (within the Republic of South Africa or within any foreign territory) terminated during the past five years on account of failure to perform on or comply with the contract?		
	If so, provide particulars:		

I, _____ (print name) hereby certify that the information, facts and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company: _____

Company Registration Number: _____

Company VAT Registration Number: _____

Signature

Date

Annexure 3 – Declaration of Interest

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

- the bidder is employed by the state; and/or

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

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

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:.....

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

2.4 Company Registration Number:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

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

¹“State” means –

(a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);

(b) any municipality or municipal entity;

(c) provincial legislature;

(d) national Assembly or the national Council of provinces; or

(e) Parliament.

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

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

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed :

.....

Position occupied in the state institution:

.....

Any other particulars:

.....

.....

.....

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

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

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

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

.....

.....

.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct **YES / NO**

business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder (i.e. shareholder, partner, director etc.), aware of any relationship (family, friend, other) between any other bidder or any other company and any person employed by the IDC or the dti who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other company whether or not they are bidding for this contract? The IDC reserves the right to undertake further background checks on any other company where partners, shareholders or any interested party of the bidder may be involved in and to consider any findings in this regard as part of its vetting processes.

YES/NO

2.11.1 If so, furnish particulars:

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

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

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

1. DECLARATION

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

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT IDC MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature Date

.....
Position Name of bidder

Annexure 4 – Shareholders and Directors Information

[Note to the bidder: the bidder must complete the information set out below. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with Returnable Schedule 2.]

5.1 Current Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% shares

Note: The bidder must also attach the detailed Company/ Group Structure where relevant.

5.2 Black Shareholders/ Members as per the B-BBEE Certificate

Name of the shareholder	ID Number	Race	Gender	% shares
Total Black Shareholding % as per the current and valid B-BBEE Certificate				

5.3 Directors

Name of the shareholder	ID Number	Race	Gender

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Annexure 6 – BEE COMMITMENT PLAN

The IDC encourages existing vendors and prospective bidders to support the objectives of B-BBEE and as far as possible strive to improve their B-BBEE contribution status. For bid evaluation purposes, bidders are allocated points in terms of a preference point system based on the B-BBEE Contribution Level status that is in accordance with a valid B-BBEE certificate.

Bidders are therefore required to submit a B-BBEE improvement plan in view of the new B-BBEE Codes of Good Practice. Bidders must indicate the extent to which their ownership, management control, employment equity, preferential procurement and enterprise development will be maintained or improved over the contract period in the event that they are successful in this bid process.