



**T14/08/16**

**PANEL OF TECHNICAL INDUSTRY  
EXPERTS TO SUPPORT IDC IN ITS  
FUNDING FOR PRIORITY SECTORS**

**BID CLOSING DATE: TUESDAY, 06  
SEPTEMBER 2016 AT 12:00 NOON**

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**SECTION 1: GENERAL CONDITIONS OF BID**

## 1. Response Format

### INSTRUCTIONS ON HOW TO COMPLETE THE BID DOCUMENT

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

#### Returnable Schedule 1

| <b>The following documents must be submitted together in a separate envelope clearly marked "Schedule 1":</b> |   |             |
|---|---|-------------|
| <b>No.</b>  | <b>Description of the Documents</b>   | <b>Tick</b> |
| 1.1   | Executive Summary (explaining how you understand the requirements of this RFP and the summary of your bid response)                 |             |
| 1.2   | Annexure 1 of this RFP document (duly completed and signed)   |             |
| 1.3   | Original and valid Tax Clearance Certificate(s) (TCC)   |             |
| 1.4   | Originally certified copies of bidder's CIPC company registration documents (listing all members with percentages, in case of a CC) |             |
| 1.5   | Originally certified copy of ID document for the Company Representative   |             |
| 1.6   | Certified copy of a resolution by Board of Directors authorising the person to sign the bid (where applicable)                      |             |
| 1.7   | Latest Financial Statements   |             |
| 1.8   | Annexure 2 of this RFP document (duly completed and signed)   |             |
| 1.9   | Annexure 3 of this RFP document (duly completed and signed)   |             |
| 1.10  | Annexure 4 of this RFP document (duly completed and signed)   |             |
| 1.11  | Annexure 5 of this RFP document (duly completed and signed)   |             |
| 1.12  | Annexure 6 of this RFP document (duly completed)  |             |
| 1.13  | Annexure 8 of this RFP document   |             |
| 1.14  | Annexure 9 of this RFP document (duly completed and signed)   |             |
| 1.15  | Valid B-BBEE verification / sworn affidavit   |             |
| 1.16  | Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)                              |             |

**Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above (1.3 to 1.7 and 1.9 to 1.11) must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).**

## **Returnable Schedule 2**

The bidder must complete and /or attach the information set out below and return it with this schedule. The bidder may also attach any or supporting documents to enhance its response. The response must include the following:

- Completed Technical Evaluation Criteria (page 16-24)
- Completed Annexure 7 (page 38-39)

### **Notes:**

- **Bidders are required to submit a bid response for each service category and the sector the bidder is bidding for in separate envelopes. Each envelope must be clearly marked outside indicating Schedule 2 with the service category and the sector the bidder is bidding for.**
- **Bidders that are bidding for the Technical Advisory and/or Market Advisory Services category must respond to the Technical Evaluation Criteria specified under Section 2A (small/ medium entity) or Section 2B (large entity).**
- **Bidders that are bidding for the Environmental, Health and Safety (EHS) service category must respond to the Technical Evaluation Criteria specified under Section 2C (small/ medium entity) or section 2D (large entity).**

## 2. Proprietary Information

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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.

## 3. Enquiries

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- 3.1 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 /Shirley Mampuru</u>   |
| Telephone Number: | <u>+27 11 269 3709/ 011 269 3583</u>  |
| Email address:    | <u><a href="mailto:mmanthudim@idc.co.za">mmanthudim@idc.co.za</a>/ <a href="mailto:shirleym@idc.co.za">shirleym@idc.co.za</a></u> |

- 3.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 30 August 2016**.
- 3.3 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](http://www.idc.co.za)) under tenders i.e. next to the same RFP document.
- 3.4 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.

## 4. Bid Validity Period

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Responses to this RFP received from bidders will be valid for a period of 180 days counted from the bid closing date.

## 5. Instructions on submission of Bids

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- 5.1 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, **T14/08/16: Appointment of a panel of technical industry experts to support IDC in its funding for priority sectors**. 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 Tuesday, 06 September 2016.
- 5.2 Bids must be submitted in the prescribed response format, herein reflected as **Response Format**.
- 5.3 The bid closing date, bidder name and the return address must also be endorsed on the envelope.
- 5.4 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.**

- 5.5 No bid response received by telegram, telex, email, facsimile or similar medium will be considered.
- 5.6 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.**
- 5.7 Amended bids may be sent in an envelope marked "Amendment to bid" and should be placed in the bid box before the closing time.

## **6. Preparation of Bid Response**

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- 6.1 All the documentation submitted in response to this RFP must be in English.
- 6.2 The bidder is responsible for all the costs that it shall incur related to the preparation and submission of the bid document.
- 6.3 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.
- 6.4 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.
- 6.5 A valid tax clearance certificate must be included in the bid response, or proof of application endorsed by SARS in this regard.

## **7. Supplier Performance Management**

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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.

## **8. Supplier Development**

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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.

## 9. IDC's Rights

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- 9.1 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.
- 9.2 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.
- 9.3 The IDC reserves the right to award this bid as a whole or in part.
- 9.4 The IDC reserves the right to conduct site visits at bidder's corporate offices and / or at client sites if so required.
- 9.5 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.
- 9.6 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.

## 10. Undertakings by the Bidder

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- 10.1 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.
- 10.2 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.
- 10.3 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.
- 10.4 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.



- 10.5 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.
- 10.6 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.

## 11. Reasons for disqualification

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- 11.1 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:
- 11.1.1 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**;
- 11.1.2 bidders who submit incomplete information and documentation according to the requirements of this RFP document;
- 11.1.3 bidders who submit information that is fraudulent, factually untrue or inaccurate information;
- 11.1.4 bidders who receive information not available to other potential bidders through fraudulent means;
- 11.1.5 bidders who do not comply with **mandatory requirements** if stipulated in the RFP document;
- 11.1.6 bidders who fail to comply with FICA requirements;

## 12. Local Production and Content

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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.

## 13. Evaluation Criteria and Weightings

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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 above
  - Submission of Company Registration Forms as referenced above
  - Submission of ID copy for the Company Representative as referenced above
  - BEE Status Certification as referenced in 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: Bidder's Information
  - Annexure 3: Supply Chain Management Questionnaire
  - Annexure 4: Declaration of Interest
  - Annexure 5: Shareholders' Information/ Group Structure
  - Annexure 6: Pricing Schedule
  - Annexure 7: Bidders Experience & Project Team
  - Annexure 8: BEE Commitment Plan
  - Annexure 9: Service Level Agreement (SLA)

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 Other Functional/ Technical Requirements

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:

##### Criteria for Small and Medium Sized Entities

| ELEMENT   | WEIGHT |
|---|--------|
| Relevant Experience of the Bidder/Bidder's team | 60%    |
| The Bidder's Recommendation/ Reference Letters  | 20%    |
| Retention Strategy                              | 10%    |
| The bidder's Value Proposition                  | 10%    |
| <b>TOTAL</b>                                    | 100%   |

**Note: Only bidders who achieved a technical score of more than 70% per service category will be considered further in terms of B-BBEE.**

##### Criteria for Large Sized Entities

| ELEMENT  | WEIGHT |
|--|--------|
| Relevant Experience of the Bidder              | 25%    |
| The Bidder's Recommendation/ Reference Letters | 15%    |
| The Bidder's Capacity of Resources/ Experts    | 20%    |
| Retention Strategy                             | 10%    |
| The Bidder's Value Proposition                 | 20%    |

| ELEMENT  | WEIGHT      |
|--|-------------|
| The Bidder's Willingness to Accept Joint Engagement For Individual Assignments With Small Black-Owned Entities | 10%         |
| <b>TOTAL</b>   | <b>100%</b> |

**Note: Only bidders who achieved a technical score of more than 70% per service category will be considered further in terms of B-BBEE.**

### 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 B-BBEE, as follows

| CRITERIA | POINTS |
|----------|--------|
| B-BBEE   | 10     |

**Note: IDC reserves the right to appoint a limited number of bidder's to the panel of Experts/ Service Providers for the provision of Professional Services to the IDC and will apply the provisions of the PPPFA in determining the Top Scoring Bidders.**

## 14. BEE Information

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The bidder must submit the 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. Qualifying Small Enterprise (QSE) with black shareholding of 51% or more may also submit a sworn affidavit. A sample of the affidavit can be downloaded on IDC website [www.idc.co.za](http://www.idc.co.za) under the tab tenders. Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

## 15. Promotion of Emerging Black owned Service Providers

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It is the IDC's objective to promote transformation across all industries and/ or sectors of the South African economy 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**

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### **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**

- 2.1 IDC is a self-financing state-owned national development finance institution that provides financing to entrepreneurs and businesses engaged in competitive industries. Its primary objective is to contribute to the creation of balanced, sustainable economic growth in South Africa and on the rest of the continent. To do this effectively and efficiently, IDC often requires assistance from industry experts and independent advisors in the below mentioned fields / sectors of the economy. It is against this background that IDC seeks to appoint a panel of technical experts and advisors to provide, on a need basis, various expert and specialised services to the IDC on various projects.
- 2.2 The IDC offers funding, investment and support in the following sectors:
  - Agro-Processing and Agriculture
  - Automotive and Transport Equipment
  - Basic and Speciality Chemicals
  - Chemical Products and Pharmaceuticals
  - Industrial Infrastructure
  - Light Manufacturing and Tourism
  - Heavy Manufacturing
  - Machinery and Equipment
  - Metals and Mining

**Note:** For more information regarding the above mentioned sectors, bidders are advised to visit [www.idc.co.za](http://www.idc.co.za) under the tab “**we fund these sectors**”.

### 3. Scope of Service

The required services have been categorised into three different categories as reflected below. Also reflected in the table are examples of services, under each service category, that bidders will be required to render to IDC on a need basis. The table for Technical Advisory Services shows examples of services relevant to each sector

| SERVICE CATEGORIES |   |
|--------------------|---|
| <b>1.</b>          | <b>Technical Advisory Services</b>                      |
| 1.1.               | - Plant lay-out design and optimisation                 |
| 1.2                | - Conduct Technical Feasibility Studies                 |
| 1.3                | - Review of Technical Feasibility Study Reports         |
| 1.4                | - Agro Processing                                       |
| 1.5                | - Soil analysis   |
| 1.6                | - Water analysis  |
| 1.7                | - Fruit & meat analysis                                 |
| 1.8                | - Water licences & title deeds,                         |
| 1.9                | - Orchard layouts & irrigations design                  |
| 1.10               | - Nursery planning                                      |
| 1.11               | - Feedlot designs                                       |
| <b>2.</b>          | <b>Market Advisory Services</b>                         |
| 2.1.               | - Market and Value Chain Research Analysis              |
| 2.2.               | - Market development and penetration Strategies         |
| 2.3                | - Benchmarking  |
| <b>3.</b>          | <b>Environmental, Health and Safety (EHS)</b>           |
| 3.1.               | - Environmental and/or Social Impact Assessments (EIAs) |
| 3.2.               | - Safety Health and Environmental Assessments.          |
| 3.3                | - Water Quality Testing Service                         |

**Note: The bidder must ensure that they provide the required response/ information to the evaluation criteria for each service category the bidder is bidding for.**

The table below indicates the sectors the bidder can bid for:

| SECTORS                               |
|---------------------------------------|
| Agro-Processing and Agriculture       |
| Automotive and Transport Equipment    |
| Basic and Speciality Chemicals        |
| Chemical Products and Pharmaceuticals |
| Industrial Infrastructure             |
| Light Manufacturing                   |
| Tourism                               |
| Heavy Manufacturing                   |
| Machinery and Equipment               |
| Metals and Mining                     |

#### 4. Specific objective of the tender

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The IDC would also like to promote broad based transformation and development of small and medium entities which provide the required services across different sectors; and as such will appoint bidders in the following categories.

| Entity Categories           | Definition  |
|-----------------------------|---|
| Category 1: Small Entities  | Entity with an annual turnover of not more than R10 million                   |
| Category 2: Medium Entities | Entity with an annual turnover greater than R10 million but below R50 million |
| Category 3: Large Entities  | Entity with an annual turnover greater than R50 million                       |

**Note: The bidder must submit their latest Financial Statements as proof of their annual turnover as confirmed by an independent accountant. Small businesses with no financial history, must submit a letter from their independent accounting firm confirming their financial status and / or projections.**

It is for this purpose that the IDC will be using different evaluation criteria for the small and medium sized entities as depicted in Section 2 (A) of this document and a different set of evaluation criteria applicable to large entities as depicted in Section 2(B) of this document.

#### 5. Contract Duration

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The service providers will be appointed to the IDC Panel for a period of three (3) years. The performance of appointed service provider(s) against this contract will be reviewed on an annual basis and/or on completion of a specific project. Subject to the performance of the service provider(s), the IDC reserves the right to extend the term of appointment for a longer period but not beyond five (5) years

**6. SECTION 2 (A): TECHNICAL EVALUATION CRITERIA APPLICABLE TO SMALL AND MEDIUM SIZED ENTITIES**

Name of Bidder: \_\_\_\_\_

Service Category: \_\_\_\_\_

Sector: \_\_\_\_\_

Authorised signatory: \_\_\_\_\_

**Note: This must be completed for each Technical Advisory and/or Market Advisory Service Category and the sector the bidder is bidding for.**

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.

**Note: The IDC will consider bids which best meet its technical requirements and bidders are required to provide relevant and comprehensive information to indicate its compliance with the stated technical requirements.**

The bidder must provide the required information for each service category that the bidder is bidding for.

| 6.1 EXPERIENCE OF THE BIDDER/BIDDER'S TEAM   | Comply | Partially Comply | Not Comply |
|--|--------|------------------|------------|
| <p>The bidder or resources/ experts in its current employ must have demonstrable experience in the service categories that the bidder is bidding for. The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• Details of recent projects the bidder has worked on for each service category the bidder is bidding for. The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to <b>Table (a) of Annexure 5</b> of this document for the format in which the required information must be provided; or</li> <li>• List of resources/ experts in the current bidder's employ. Please refer to <b>Table (b) Annexure 5</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the service category(s) the bidder is bidding for.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>   |        |                  |            |



| 6.2 RECOMMENDATION/ REFERENCE LETTERS  | Comply | Partially Comply | Not Comply |
|--|--------|------------------|------------|
| <p>The bidder must provide reference/ recommendation letter(s) from a client(s) where the bidder recently provided each service category the bidder is bidding for.</p> <p>The bidder must also furnish the IDC with relevant contact details of its key clients for reference check purposes.</p> |        |                  |            |
| <b>Substantiate / Comments</b>   |        |                  |            |

| 6.3 VALUE PROPOSITION   | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>Please indicate your entities value proposition to the IDC and indicate what sets you apart in each service category you are bidding for. The following and other aspects of the value proposition must be covered:</p> <ul style="list-style-type: none"> <li>• Matters concerning management and quality control procedures;</li> <li>• Matters concerning effective and efficient communication with the client;</li> <li>• System/Tools used</li> <li>• Indication of how the bidder ensures that they stay abreast of innovations in their specific area of expertise.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

**7. SECTION 2 (B) TECHNICAL EVALUATION CRITERIA APPLICABLE TO LARGE ENTITIES**

Name of Bidder: \_\_\_\_\_  
 Service Category: \_\_\_\_\_  
 Sector: \_\_\_\_\_  
 Authorised signatory: \_\_\_\_\_

**Note: This must be completed for each Technical Advisory and/or Market Advisory Service Category and the sector the bidder is bidding for:**

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.

**Note:** The IDC will consider bids which best meet its technical requirements and bidders are required to provide relevant and comprehensive information to indicate its compliance with the stated technical requirements.

The bidder must provide the required information for each service category that the bidder is bidding for.

| 7.1 BIDDER'S EXPERIENCE   | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must have demonstrable experience in the service categories that the bidder is bidding for.</p> <p>The bidder must provide details of recent projects they have worked on, providing for each service category the bidder is bidding for. The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to <b>Table (a) of Annexure 5</b> of this document for the format in which the required information must be provided.</p> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 7.2 RETENTION STRATEGY  | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must as part of this proposal provide a retention strategy to ensure relevant skills are retained to manage the IDC contract.</p> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 7.3 RECOMMENDATION/ REFERENCE LETTERS  | Comply | Partially Comply | Not Comply |
|--|--------|------------------|------------|
| <p>The bidder must provide reference/ recommendation letter(s) from a client(s) where the bidder recently provided each service category the bidder is bidding for.</p> <p>The bidder must also furnish the IDC with relevant contact details of its key clients for reference check purposes.</p> |        |                  |            |
| <b>Substantiate / Comments</b>   |        |                  |            |

| 7.4 CAPACITY OF RESOURCES/ EXPERTS  | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must have in its current employ resources/ experts that have experience in the service categories the bidder is bidding for.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• List of resources/ expert(s) in the current bidder's employ. Please refer to <b>Table (b) Annexure 5</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the service category(s) the bidder is bidding for.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 7.5 VALUE PROPOSITION   | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>Please indicate your entities value proposition to the IDC and indicate what sets you apart in each service category you are bidding for. The following and other aspects of the value proposition must be covered:</p> <ul style="list-style-type: none"> <li>• Matters concerning management and quality control procedures;</li> <li>• Matters concerning effective and efficient communication with the client;</li> <li>• System/Tools used</li> <li>• Indication of how the bidder ensures that they stay abreast of innovations in their specific area of expertise.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| <b>7.6 WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENTS WITH SMALL BLACK-OWNED ENTITIES</b>   | <b>Comply</b> | <b>Partially Comply</b> | <b>Not Comply</b> |
|--|---------------|-------------------------|-------------------|
| <p>The IDC intends promoting the transformation of the professional services sector across the service categories through inclusive development of small Black-owned entities. Successful bidders may be required from time to time to enter into twinning/ partnering arrangements with small Black owned entities in the panel.</p> <p>Bidders are required to confirm their acceptance of this condition and indicate the current similar arrangements that the bidder is engaged on.</p> |               |                         |                   |
| <b>Substantiate / Comments</b>   |               |                         |                   |

**8. SECTION 2 (C) TECHNICAL EVALUATION CRITERIA APPLICABLE TO SMALL AND MEDIUM SIZED ENTITIES**

Name of Bidder: \_\_\_\_\_

Service Category: Environmental, Health and Safety (EHS)

Authorised signatory: \_\_\_\_\_

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.

Note: The IDC will consider bids which best meet its technical requirements and bidders are required to provide relevant and comprehensive information to indicate its compliance with the stated technical requirements.

The bidder must provide the required information for each service category that the bidder is bidding for.

| 8.1 EXPERIENCE OF THE BIDDER/BIDDER'S TEAM   | Comply | Partially Comply | Not Comply |
|--|--------|------------------|------------|
| <p>The bidder or resources/ experts in its current employ must have demonstrable experience in the service categories that the bidder is bidding for. The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• Details of recent projects the bidder has worked on for each service category the bidder is bidding for. The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to <b>Table (a) of Annexure 5</b> of this document for the format in which the required information must be provided; or</li> <li>• List of resources/ experts in the current bidder's employ. Please refer to <b>Table (b) Annexure 5</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence and "Professional registration with the applicable bodies." relevant to the service category(s) the bidder is bidding for.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>   |        |                  |            |

| 8.2 RECOMMENDATION/ REFERENCE LETTERS  | Comply | Partially Comply | Not Comply |
|--|--------|------------------|------------|
| <p>The bidder must provide reference/ recommendation letter(s) from a client(s) where the bidder recently provided each service category the bidder is bidding for.</p> <p>The bidder must also furnish the IDC with relevant contact details of its key clients for reference check purposes.</p> |        |                  |            |
| <b>Substantiate / Comments</b>   |        |                  |            |

| 8.2 RETENTION STRATEGY  | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must as part of this proposal provide a retention strategy to ensure relevant skills are retained to manage the IDC contract.</p> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 8.4 VALUE PROPOSITION   | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>Please indicate your entities value proposition to the IDC and indicate what sets you apart in each service category you are bidding for. The following and other aspects of the value proposition must be covered:</p> <ul style="list-style-type: none"> <li>• Matters concerning management and quality control procedures;</li> <li>• Matters concerning effective and efficient communication with the client;</li> <li>• System/Tools used</li> <li>• Indication of how the bidder ensures that they stay abreast of innovations in their specific area of expertise.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

**9. SECTION 2 (D) TECHNICAL EVALUATION CRITERIA APPLICABLE TO LARGE ENTITIES**

Name of Bidder: \_\_\_\_\_

Service Category: \_\_\_\_\_

**Environmental, Health and Safety (EHS)**

Authorised signatory: \_\_\_\_\_

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.

**Note:** The IDC will consider bids which best meet its technical requirements and bidders are required to provide relevant and comprehensive information to indicate its compliance with the stated technical requirements.

The bidder must provide the required information for each service category that the bidder is bidding for.

| 9.1 BIDDER'S EXPERIENCE   | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must have demonstrable experience in the service categories that the bidder is bidding for.</p> <p>The bidder must provide details of recent projects they have worked on, providing for each service category the bidder is bidding for. The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to <b>Table (a) of Annexure 5</b> of this document for the format in which the required information must be provided.</p> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 9.2 RECOMMENDATION/ REFERENCE LETTERS  | Comply | Partially Comply | Not Comply |
|--|--------|------------------|------------|
| <p>The bidder must provide reference/ recommendation letter(s) from a client(s) where the bidder recently provided each service category the bidder is bidding for.</p> <p>The bidder must also furnish the IDC with relevant contact details of its key clients for reference check purposes.</p> |        |                  |            |
| <b>Substantiate / Comments</b>   |        |                  |            |

| 9.3 CAPACITY OF RESOURCES/ EXPERTS  | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must have in its current employ resources/ experts that have experience in the service categories the bidder is bidding for.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• List of resources/ expert(s) in the current bidder's employ. Please refer to <b>Table (b) Annexure 5</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence and "Professional registration with the applicable bodies." relevant to the service category(s) the bidder is bidding for.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 9.4 RETENTION STRATEGY  | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>The bidder must as part of this proposal provide a retention strategy to ensure relevant skills are retained to manage the IDC contract.</p> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |

| 9.5 VALUE PROPOSITION   | Comply | Partially Comply | Not Comply |
|---|--------|------------------|------------|
| <p>Please indicate your entities value proposition to the IDC and indicate what sets you apart in each service category you are bidding for. The following and other aspects of the value proposition must be covered:</p> <ul style="list-style-type: none"> <li>• Matters concerning management and quality control procedures;</li> <li>• Matters concerning effective and efficient communication with the client;</li> <li>• System/Tools used</li> <li>• Indication of how the bidder ensures that they stay abreast of innovations in their specific area of expertise.</li> </ul> |        |                  |            |
| <b>Substantiate / Comments</b>  |        |                  |            |



| <b>9.6 WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENTS WITH SMALL BLACK-OWNED ENTITIES</b>   | <b>Comply</b> | <b>Partially Comply</b> | <b>Not Comply</b> |
|--|---------------|-------------------------|-------------------|
| <p>The IDC intends promoting the transformation of the professional services sector across the service categories through inclusive development of small Black-owned entities. Successful bidders may be required from time to time to enter into twinning/ partnering arrangements with small Black owned entities in the panel.</p> <p>Bidders are required to confirm their acceptance of this condition and indicate the current similar arrangements that the bidder is engaged on.</p> |               |                         |                   |
| <b>Substantiate / Comments</b>   |               |                         |                   |

## **SECTION 3: 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:**

|   |  |
|---|--|
| <b>Supplier Number</b>                      |  |
| <b>Unique registration reference number</b> |  |

### BIDDING STRUCTURE

| Indicate the type of Bidding Structure by marking with an 'X': |  |
|--|--|
| <b>Individual Bidder</b>                                       |  |
| <b>Joint Venture/ Consortium</b>                               |  |
| <b>Prime Contractor with Sub Contractors</b>                   |  |
| <b>Other</b>   |  |

### REQUIRED INFORMATION

| If Individual Bidder:          |  |
|--------------------------------|--|
| <b>Name of Company</b>         |  |
| <b>Registration Number</b>     |  |
| <b>Vat registration Number</b> |  |
| <b>Contact Person</b>          |  |
| <b>Telephone Number</b>        |  |
| <b>Cellphone Number</b>        |  |

|                  |  |
|------------------|--|
| Fax Number       |  |
| Email address    |  |
| Postal Address   |  |
| Physical Address |  |

| <b>If Joint Venture or Consortium, indicate the following for each partner:</b> |  |
|---|--|
| <b>Partner 1</b>  |  |
| 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           |  |
| <b>Partner 2</b>  |  |
| 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           |  |

| <b>If bidder is a Prime Contractor using Sub-contractors, indicate the following:</b> |  |
|---|--|
| <b>Prime Contractor</b>   |  |
| Name of Company   |  |
| Registration Number   |  |
| Vat registration Number   |  |
| Contact Person  |  |
| Telephone Number  |  |
| Cellphone Number  |  |
| Fax Number  |  |
| Email address   |  |
| Postal Address  |  |
| Physical Address  |  |
| <b>Sub contractors</b>  |  |
| 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 – Bidder’s Information

Request for Proposal No: \_\_\_\_\_

Name of Bidder: \_\_\_\_\_

Authorised signatory: \_\_\_\_\_

Name of Authorised Signatory \_\_\_\_\_

Position of Authorised Signatory \_\_\_\_\_

1. The bidder must indicate, in the table below, with a **tick (✓)** the relevant **entity size**:

| ENTITY CATEGORIES           | DEFINITION  | PLEASE TICK (✓) |
|-----------------------------|---|-----------------|
| Category 1: Small Entities  | Entity with an annual turnover of not more than R10 million                   |                 |
| Category 2: Medium Entities | Entity with an annual turnover greater than R10 million but below R50 million |                 |
| Category 3: Large Entities  | Entity with an annual turnover greater than R50 million                       |                 |

2. The bidder must indicate, in the table below, with a tick (✓) the sector and the **service category** the bidder is bidding for:

| SECTOR                                | SERVICE CATEGORIES          |                             |
|---------------------------------------|-----------------------------|-----------------------------|
|                                       | TECHNICAL ADVISORY SERVICES | MARKETING ADVISORY SERVICES |
| Agro-Processing and Agriculture       |                             |                             |
| Automotive and Transport Equipment    |                             |                             |
| Basic and Speciality Chemicals        |                             |                             |
| Chemical Products and Pharmaceuticals |                             |                             |
| Industrial Infrastructure             |                             |                             |
| Light Manufacturing                   |                             |                             |
| Tourism                               |                             |                             |
| Machinery and Equipment               |                             |                             |
| Metals and Mining                     |                             |                             |

3. The bidder must indicate in the table below, with a tick (✓) if the bidder is bidding for Environmental, Health and Safety (EHS) category:

| SERVICE CATEGORY                       | PLEASE TICK (✓) |
|--|-----------------|
| Environmental, Health and Safety (EHS) |                 |

## Annexure 3 - 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 1.]

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, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> , 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<br><input type="checkbox"/> | No<br><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 4 – Declaration of Interest

1. Any legal person, including persons employed by the state<sup>1</sup>, 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, shareholder<sup>2</sup>):

.....

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.

<sup>1</sup>“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.

<sup>2</sup>“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 **YES / NO**  
 presently employed by the state?

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 **YES / NO**  
 the appropriate authority to undertake remunerative  
 work outside employment in the public sector?

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

(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 / **YES / NO**  
trustees / shareholders / members or their spouses conduct  
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 **YES /**  
**NO**  
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?

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder (i.e. shareholder, partner, **YES / NO**  
director etc.), aware of any relationship (family, friend, other) between any other  
bidder or any other company and any person employed by the IDC  
who may be involved with the evaluation and or adjudication of this bid?

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members **YES/NO**  
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.

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 5 – 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 1.]

### 5.1 Shareholders/ Members

| Name of the shareholder | ID Number | Race | Gender | % shares |
|-------------------------|-----------|------|--------|----------|
|                         |           |      |        |          |
|                         |           |      |        |          |
|                         |           |      |        |          |
|                         |           |      |        |          |
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|                         |           |      |        |          |
|                         |           |      |        |          |
|                         |           |      |        |          |

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 |
|--|-----------|------|--------|----------|
|  |           |      |        |          |
|  |           |      |        |          |
|  |           |      |        |          |
|  |           |      |        |          |
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|  |           |      |        |          |
|  |           |      |        |          |
|  |           |      |        |          |
|  |           |      |        |          |
| Total Black Shareholding % as per the current and valid B-BBEE Certificate |           |      |        |          |

**5.3 Directors**

| Name of the shareholder | ID Number | Race | Gender |
|-------------------------|-----------|------|--------|
|                         |           |      |        |
|                         |           |      |        |
|                         |           |      |        |
|                         |           |      |        |
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|                         |           |      |        |
|                         |           |      |        |
|                         |           |      |        |

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

## Annexure 6 – Pricing Schedule

The bidder must complete the Pricing Schedule below which must be submitted with the bid response as Returnable Schedule 1:

The bidder must indicate their standard rates:

| No. | Name of Resource/ Expert | Designation | Years of Experience | Hourly Rate (VAT Excl.) |
|-----|--------------------------|-------------|---------------------|-------------------------|
| 1   |                          |             |                     |                         |
| 2   |                          |             |                     |                         |
| 3   |                          |             |                     |                         |
| 4   |                          |             |                     |                         |
| 5   |                          |             |                     |                         |
| 6   |                          |             |                     |                         |
| 7   |                          |             |                     |                         |
| 8   |                          |             |                     |                         |
| 9   |                          |             |                     |                         |
| 10  |                          |             |                     |                         |
| 11  |                          |             |                     |                         |
| 12  |                          |             |                     |                         |
| 13  |                          |             |                     |                         |
| 14  |                          |             |                     |                         |
| 15  |                          |             |                     |                         |

## Annexure 7: Response Format for Section 2 Proposed Senior Experts

Request for Proposal No: \_\_\_\_\_

Name of Bidder: \_\_\_\_\_

Service Category \_\_\_\_\_

Sector \_\_\_\_\_

Authorised signatory: \_\_\_\_\_

*[Note to the Bidder: The bidder must complete the information set out below in response to the requirements stated in Section 2 of this bid document. 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 this Returnable Schedule 2.]*

**The bidder must provide the following information:**

**Table (a) Details of the bidder's current and past experience in the service categories the bidder is bidding for (please refer to paragraphs 3, 6.1, 7.1, 8.1 and 9.1 of**

**Section 2 of this RFP document):**

| <b>Client' Name</b> | <b>Service Category<br/>Speciality (e.g.<br/>Engineering and<br/>Architectural<br/>Design)</b> | <b>Project<br/>Value</b> | <b>Project period<br/>(Start Dates)</b> | <b>Project period<br/>( End Dates)</b> | <b>Description of service<br/>performed and extent of<br/>Bidder's responsibilities</b> | <b>Name, title and<br/>telephone contact of<br/>client</b> |
|---------------------|--|--------------------------|---|--|---|--|
|                     |  |                          |   |  |   |  |
|                     |  |                          |   |  |   |  |
|                     |  |                          |   |  |   |  |
|                     |  |                          |   |  |   |  |
|                     |  |                          |   |  |   |  |



**Table (b) Details of the key personnel of the bidders' proposed team of professionals for the service category the bidder is bidding for:**

| Name | Years of Experience | Role / Duties in Passed Project | Experience in Relevant Passed Project       |              |
|------|---------------------|---------------------------------|---|--------------|
|      |                     |                                 | Project description, Client, Project period | Project Cost |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |
|      |                     |                                 |   |              |

## **Annexure 8 – 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.

## **Annexure 9 – SERVICE LEVEL AGREEMENT (SLA)**

Bidders must refer to annexure 9 attached as a separate document. The SLA must be downloaded, completed and submitted together with the returnable documents as mentioned in schedule one of the bid document.