



T16/09/16

**APPOINTMENT OF A PANEL OF
PREFERRED SERVICE PROVIDERS FOR
THE BUSINESS SUPPORT PROGRAMME**

**BID CLOSING DATE: TUESDAY, 27
SEPTEMBER 2016 AT 12:00 NOON**

SECTION 1: GENERAL CONDITIONS OF BID

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1. Response Format (Returnable Schedules)

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

<u>The following documents must be submitted together in a separate envelope clearly marked "Schedule 1":</u>		
No.	Description of the Documents	Tick
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 9 of this RFP document (duly completed and signed)	
1.14	Annexure 10 of this RFP document (duly completed and signed)	
1.15	Valid B-BBEE verification certificate / sworn affidavit	
1.16	Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)	
1.17	Company profile	

Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above (1.3- 1.7, 1.9 -1.11 and 1.15) 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 (see notes below) with all required information clearly cross-referenced to the relevant requirement
- Annexure 7 of this RFP document (duly completed)

Notes:

- **Bidders are required to submit a bid response for each service category that the bidder is bidding for in a separate envelope. Each envelope must be clearly marked outside indicating: Schedule 2, Service Category, and Service Code.**
- **Bidders that are bidding for General Business Support and/ or Functional Management Areas must submit separate responses for each province that the bidder has presence in i.e. each province is regarded as a separate Service Category.**

2. 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.

3. Enquiries

- 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>mmanthudim@idc.co.za/ shirleym@idc.co.za</u>

- 3.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 20 September 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) 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

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

5. Instructions on submission of Bids

- 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, **T16/08/16: Appointment of a panel of preferred service providers for the Business Support Programme**. 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, 27 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

- 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

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

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

- 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 service provider 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

- 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

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

12. 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.

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 1.3 above
 - Submission of Company Registration Forms as referenced 1.4 above
 - Submission of ID copy for the Company Representative as referenced in 1.5 above
 - BEE Status Certification as referenced in 1.15 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
 - Annexure 1: Acceptance of Bid Conditions
 - Annexure 2: Bidders Information
 - Annexure 3: Supply Chain Management Questionnaire
 - Annexure 4: Declaration of Interest
 - Annexure 5: Shareholders' Information/ Group Structure
 - Annexure 6: Pricing Schedule
 - Annexure 7: Bidder's Experience & Project Team
 - Annexure 9: BEE Commitment Plan
 - Annexure 10: 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	55%
Experience in working with Youth entrepreneurs	10%
The Bidder's Recommendation/ Reference Letters	20%
Retention Strategy	5%
The bidder's Value Proposition	10%
TOTAL	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.

Large Sized Entities

ELEMENT	WEIGHT
Relevant Experience of the Bidder	25%
Experience in working with Youth entrepreneurs	10%
The Bidder's Recommendation/ Reference Letters	15%
The Bidder's Capacity of Resources/ Experts	20%

ELEMENT	WEIGHT
Retention Strategy	5%
The Bidder's Value Proposition	15%
The Bidder's Willingness to Accept Joint Engagement For Individual Assignments With Small Black-Owned Entities	10%
TOTAL	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.

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:

CRITERIA	POINTS
B-BBEE	10

Note: IDC reserves the right to appoint a limited number of bidders 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. Promotion of Emerging Black owned Service Providers

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

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. Introduction

IDC is a self-financing state-owned national development finance institution that provides financing to entrepreneurs and businesses engaged in competitive industries. Its primary objectives are to contribute to the generation of balanced, sustainable economic growth in Africa and to the economic empowerment of the South African population, thereby promoting the economic prosperity of all citizens. It achieves this by promoting entrepreneurship through the building of competitive industries and enterprises based on sound business principles.

IDC's Operations Head Office provides business support services to prospective and existing IDC clients through the Business Support Programme (BSP). Business support is provided through IDC's head office and the regional offices established in all the provinces of South Africa. The BSP focuses predominantly on small and medium enterprises (SMEs). The aim of the BSP is to promote the long-term viability and sustainability of IDC-funded businesses and the promotion of entrepreneurship through consultancy services and training.

The BSP engages outsourced service providers to render business support services. The consultancy costs are generally shared between the IDC and its business partners.

3. Purpose of this Tender

The IDC wishes to establish a new panel of preferred service providers to be engaged on an ad hoc basis to render business support services to IDC and its clients.

4. Background Information

- 4.1 BSP provides technical assistance to its clients in the form of management consulting, advice, guidance, mentoring and B-BBEE consulting. Various Strategic Business Units (SBUs) and departments within IDC would request business support services from the

BSP on behalf of their clients. The BSP engages outsourced service providers to provide the services.

Hereunder is the process that BSP follows leading to the engagement of the service providers:

- BSP receives a request from the SBU/department.
- BSP screens the request to ensure fit with the BSP mandate.
- BSP conducts business diagnosis to determine business support needs, intervention objectives, estimated costs and timeframe for the intervention. These issues are included in the Terms of Reference (ToR) for each intervention.
- The client representatives, the BSP representative and SBU/department representative all sign the ToR to indicate agreement on the content of the ToR.
- Business support funding approval is requested from the relevant IDC funding authority.
- The BSP identifies the appropriate service provider(s) on the business support panel of service providers for engagement with the client.
- BSP contacts the service provider(s) identified and, if available for engagement, is required to provide an Action Plan for the intervention, which must be acceptable to the client and IDC.
- BSP issues a Letter of Engagement to the service provider(s) to be signed-off before engaging with the client.

Service provider(s) implements and submits reports, timesheets and invoices on a regular basis as per the ToR and/or the Letter of Engagement. The BSP provides ongoing monitoring of the performance of the service provider(s) to ensure compliance with the ToR. The service provider(s) submits an exit report on completion of the intervention. No invoice is paid without supporting reporting documentation.

4.2 Engagements and Demands

An engagement with a client ranges from as little as a few days to an average of about 60 man days. There is usually an initial stage where the bulk of hours are used in analysis, design and implementation of a solution, with a tail-end of monitoring that could go on for up to two years afterwards.

IDC's current client base is approximately 1,707 clients. Approximately 64% of new finance approvals in the last financial year were for SMEs who could potentially receive business support.

4.3 Instances where Business Support is provided

The need for business support is determined either when IDC receives applications from entrepreneurs to finance their existing/future businesses or in the normal course of monitoring existing IDC clients. In cases where the entrepreneurs and managers in those enterprises have limited business management skills and experience or face management challenges then business support intervention would be required.

This usually happens with small and medium-sized enterprises (SMEs) where entrepreneurs and managers, together with their staff (and in some cases members of the board of directors) may require support and training to improve their management

abilities to run their businesses successfully. Business support could be provided in areas such as general management, marketing and sales, production, finance and accounting, human resources and organizational development, policy development, corporate governance, strategy and business planning, etc.

Below are some examples of the types of clients that would require business support:

4.3.1 Clients in the pre-establishment phase

- Prospective clients who have submitted applications for finance at IDC but their business plans require enhancement and supporting documents in order to complete assessment of their applications.
- Prospective clients who have submitted applications for finance at IDC but their applications lack information such as proof of market acceptance, detailed market study, environmental impact assessment and quantity survey report.

4.3.2 Clients in the start-up phase

- Clients that need assistance and guidance to commence business.
- Clients needing assistance in dealing with teething problems.
- Clients involved in acquisition of going concerns and require assistance with transition into the new management regime.
- Clients with limited management experience who require support.
- Clients requiring assistance with the establishment of processes, systems and controls in various functions in their businesses.
- Clients requiring support in financial management and reporting.
- Assistance to comply with corporate obligations (e.g. tax, environmental, health and safety, corporate governance, skills development, HIV/AIDS plan, etc.)

4.3.3 Clients in the growth phase

- Clients requiring assistance with industry and market research.
- Clients requiring assistance with product development.
- Clients expanding their operations.
- Clients requiring assistance with the analysis and improvement of processes, systems and controls in various functions in their businesses.
- Clients requiring support in financial management and reporting.
- Clients requiring assistance in improving sales performance.

4.3.4 Clients in the maturity phase

- Clients requiring support to consolidate their operations.
- Clients requiring to put the business on a new growth path.

- Clients requiring support to diversify product or service offerings.

4.3.5 Clients in the decline phase

- Clients in decline or distress and require turnaround or re-engineering to overcome their challenges.

4.4 Use of Service providers

The BSP makes use of service providers to render business support to IDC clients. Before a service provider is engaged with a client, terms of reference are documented to outline the nature of consulting work to be performed, the issues to be addressed and desired outcome, the time frame and budget. A suitable service provider is selected from the panel that best matches the following criteria:

- Skills, knowledge and experience relevant to the client's business and industry/sector.
- Consulting expertise appropriate for task at hand.
- Proximity to the client, and/or willingness to travel to client's business premises.
- Availability when required.
- Competitive consulting rates

5. Types of Service Providers Required

The IDC intends to establish a panel of service providers with certain types of skills, knowledge, experience and expertise that would be used to provide business support assistance to its clients. Mainly business support requires the following types of service providers:

- Service providers with generalist skills
- Service providers with expertise in specific industries/sectors or sub-sectors
- Service providers with expertise in specific functions
- Mentors

Below is a brief explanation of the above service provider groupings (**Please refer to Annexure7 of this document for the specifications of required services**):

5.1 Service providers with Generalist Skills (General Business Support)

These are service providers with knowledge, skills, or interest in several business management areas or functions but with no specialty. For example they would have consulting skills in the areas of policy and governance, business strategy, general management, marketing, sales, finance, accounting, human capital, production, etc. These service providers must be able to support clients' management and members of the board of directors of their companies in planning, analyzing and implementing interventions. They would also be expected to monitor implementation by the clients. They must also have the ability to coach, mentor, handhold and nurture entrepreneurs, board members, managers and employees.

5.2 Service providers with industry/sector or sub-sector expertise (Industry/Sector Experts)

These are service providers with industry/sector or sub-sector specific expertise. They will be required to provide expert consulting services in specific industries, sectors or subsectors, which would be in line with IDC's mandate and strategic business units (SBUs).

5.3 Service providers with expertise in specific functions (Functional Management Areas)

The BSP may need to engage service providers with expertise in the following functions/activities:

- Policy development
- Process development and mapping
- Business strategy
- Business diagnosis
- Business turnaround
- Business process reengineering
- Productivity improvement (Kaizen and 5S activities)
- Change management
- Human capital
- Cost and management accounting
- Financial accounting
- Preparation and auditing of financial statements
- Enterprise Resource Planning (ERP) systems provision, installation and training
- Marketing strategy
- Market research/studies
- Market development
- Development and implementation of sales framework (sales planning, strategy, forecasting, monitoring, establishment of distribution networks etc.)

5.4 Service providers with specialised services

- Environmental Impact Assessment (EIA)
- Environmental, Health and Safety (EHS) assessment, policies and procedures
- Quality certification or accreditation
- Establishment of trusts and cooperatives
- Technical assessment

5.5 Mentors and Coaches

Mentoring is a long-term practical approach to guiding entrepreneurs to develop their own abilities and insights as they start and grow their business. It is a relationship between a mentor and a mentee in which experimentation, exchange and learning can occur and skills, knowledge and insight can be developed.

Coaching is a short-term task oriented process whereby the coach imparts specific skills to the coachee in order to achieve overall developmental objectives.

6. General Minimum Requirements for Service providers

- 6.1 The service provider must possess the following attributes:
- Ability to plan, analyse, implement and monitor business support interventions
 - Monitor client's activities, and help the client correct failures or introduce improvements in the business
 - Demonstrate the financial impact of any decision made in a business
 - Ability to prepare comprehensive intervention reports on progress achieved
 - Ability to account for one's consulting activities and accurately prepare timesheets and invoices for work done
 - Ability to interview and interact with clients at all levels in an organization
 - Ability to communicate verbally and in writing in the relevant official language.
 - Ability to transfer skill and knowledge to clients
 - Ability to guide, counsel, advice and mentor clients
 - Make recommendations to the client in an effective manner
 - Ability to develop and maintain good working relationships with clients
 - Presentation skills
 - Ability to patiently engage with illiterate and semi-literate entrepreneurs-
 - Willingness to consult to businesses based in rural areas as well as an understanding of cultural dynamics in those areas.

7. Communication

To ensure effective communication with clients, it is desirable that service providers should be in a position to converse with the targeted clients in the languages they understand best over and above being able to communicate in English.

8. Specific objective of the tender

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.

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	

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.

9. Scope of Service

The required services have been categorised into different specialisation and sectors as reflected below, bidders will be required to render to IDC, on a need basis, the below services:

SERVICE CATEGORY	SERVICE CODE
GENERAL BUSINESS SUPPORT	
NW	GEN/1001
FS	GEN/1002
KZN	GEN/1003
WC	GEN/1004
EC	GEN/1005
MP	GEN/1006
LIM	GEN/1007
NC	GEN/1008
GP	GEN/109
FUNCTIONAL MANAGEMENT AREAS	
NW	FUN/1001
FS	FUN/1002
KZN	FUN/1003
WC	FUN/1004
EC	FUN/1005
MP	FUN/1006
LIM	FUN/1007
NC	FUN/1008
GP	FUN/1008
MENTORSHIP AND COACHING	MEN/1000
INDUSTRY/SECTOR EXPERTS	

SERVICE CATEGORY	SERVICE CODE
AGRO-PROCESSING AND AGRICULTURE	AGRO/1000
BASIC METALS AND MINING	BMM/1000
BASIC AND SPECIALTY CHEMICALS	BSC/1000
CLOTHING & TEXTILES	TEXTILES/1000
HEAVY MANUFACTURING	HEAVYMAN/1000
CHEMICAL PRODUCTS & PHARMACEUTICALS	CPP/1000
MACHINERY & EQUIPMENT	MACHEQU/1000
LIGHT MANUFACTURING & TOURISM	LMANT/1000
AUTOMOTIVE & TRANSPORT EQUIPMENT	AUTOMOTIVE1000
INDUSTRIAL INFRASTRUCTURE	INDUSTRIALIN/1000
MEDIA AND MOTION PICTURES	MEDIA/1000
NEW INDUSTRIES	NEWIND/1000
SOCIO ECONOMIC DEVELOPMENT	SED/1000
WORKOUT & RESTRUCTURING	W&R/1000
ENVIRONMENTAL, HEALTH & SAFETY	EHS/1000

NOTE: Bidders are required to submit a bid response for each category the bidder is bidding for in separate envelopes. Each envelope must be clearly marked outside indicating the service category the bidder is bidding for. Please refer to Annexure 2 of this bid document for the format in which the required formation must be provided.

10. Project Timelines

The appointed service provider(s) will be required to start immediately after signing the contract and provide the services, on a need basis, for a period of five (5) years, subject to annual review of service provider's performance.

11. Mandatory 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.

Note: This mandatory requirement is applicable to all bidders/ entity categories.

Mandatory	Comply	Not Comply
<p>The bidder must confirm that they have read and understood the terms and conditions set out in the attached Service Level Agreement (Annexure 10) which terms and conditions the bidder accepts, in the event that the IDC awards contract to the bidder pursuant to this bid.</p> <p>The bidder must complete the missing information on the Service Level Agreement as indicated and will be required to sign off on the terms and conditions together with initialling each page of the terms and conditions.</p>		
Substantiate / Comments		

12. SECTION 2(A) TECHNICAL EVALUATION CRITERIA FOR SMALL & MEDIUM SIZED ENTITIES

Name of Bidder: _____

Service Category: _____

Code: _____

Authorised signatory: _____

Note: This must be completed for each Service Category 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.

12.1.1 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"> • 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 Table (a) of Annexure 6 of this document for the format in which the required information must be provided; or • List of resources/ experts in the current bidder's employ. Please refer to Table (b) Annexure 6 of this document for the format in which the required information must be provided. • CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence and networks relevant to the sector/service category(s) the bidder is bidding for. The CV must also indicate language proficiency. • The following information must be provided: (i.e. challenge/problem at the company where the service provider was engaged, how the service provider intervened, what the outcome of the intervention was), 			
Substantiate / Comments			

12.1.2 EXPERIENCE IN WORKING WITH YOUTH ENTREPRENEURS	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"> • Details of recent projects the bidder has worked on for each service category the bidder is bidding for in working with young entrepreneurs. The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to Table (c) of Annexure 7 of this document for the format in which the required information must be provided; or • List of resources/ experts in the current bidder's employ. Please refer to Table (b) Annexure 7 of this document for the format in which the required information must be provided. • 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. The CV must also indicate language proficiency. • The following information must be provided: (i.e. challenge/problem at the company where the service provider was engaged, how the service provider intervened, what the outcome of the intervention was), 			
Substantiate / Comments			

12.1.3 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>			
Substantiate / Comments			

12.1.4 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"> • Matters concerning management and quality control procedures; • Matters concerning effective and efficient communication with the client; • System/Tools used • Indication of how the bidder ensures that they stay abreast of innovations in their specific area of expertise. 			
Substantiate / Comments			

12.1.5 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>			
Substantiate / Comments			

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

Name of Bidder: _____
 Service Category: _____
 Code: _____
 Authorised signatory: _____

Note: This must be completed for each Service Category 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.

13.1.1 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 experience must be in the following:</p> <ul style="list-style-type: none"> • Consulting to SMEs and/or large businesses within their chosen area(s) of specialization. • Working with DFIs or with DFIs' clients. <p>The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to Table (a) of Annexure 7 of this document for the format in which the required information must be provided.</p> <p>The following information must be provided: (i.e. challenge/problem at the company where the service provider was engaged, how the service provider intervened, what the outcome of the intervention was),</p>			
<p>Substantiate / Comments</p>			

13.1.2 EXPERIENCE IN WORKING WITH YOUTH ENTREPRENEURS	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, with youth entrepreneurs for each service category the bidder is bidding for.</p> <p>The IDC reserves the right to consider experiences of service providers that have done work for the IDC in the past. Please refer to Table (c) of Annexure 7 of this document for the format in which the required information must be provided.</p> <p>The following information must be provided: (i.e. challenge/problem at the company where the service provider was engaged, how the service provider intervened, what the outcome of the intervention was),</p>			
Substantiate / Comments			

13.1.3 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>			
Substantiate / Comments			

13.1.4 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"> • List of resources/ expert(s) in the current bidder's employ. Please refer to Table (b) Annexure 6 of this document for the format in which the required information must be provided. • CVs of the resources/ expert(s); and the CVs must clearly highlight qualifications, areas of experience/ competence and networks relevant to the sector/service category(s) the bidder is bidding for. The CV must also indicate language proficiency 			
Substantiate / Comments			

13.1.5 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"> • Matters concerning management and quality control procedures; • Matters concerning effective and efficient communication with the client; • System/Tools used • Indication of how the bidder ensures that they stay abreast of innovations in their specific area of expertise. 			
Substantiate / Comments			

13.1.6 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>			
Substantiate / Comments			

13.1.7 WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENTS WITH SMALL BLACK-OWNED ENTITIES	Comply	Partially Comply	Not Comply
<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 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>			
Substantiate / Comments			

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 – 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 **service category** the bidder is bidding for:

NOTE: Bidders that are bidding for General Business Support and/ or Functional Management Areas must submit separate responses for each province that the bidder has presence in.

SERVICE CATEGORY	SERVICE CODE	Tick (✓)
GENERAL BUSINESS SUPPORT		
NW	GEN/1001	
FS	GEN/1002	
KZN	GEN/1003	
WC	GEN/1004	
EC	GEN/1005	
MP	GEN/1006	
LIM	GEN/1007	
NC	GEN/1008	
GP	GEN/1009	
FUNCTIONAL MANAGEMENT AREAS		
NW	FUN/1001	
FS	FUN/1002	
KZN	FUN/1003	
WC	FUN/1004	

SERVICE CATEGORY	SERVICE CODE	Tick (✓)
EC	FUN/1005	
MP	FUN/1006	
LIM	FUN/1007	
NC	FUN/1008	
GP	FUN/1009	
MENTORSHIP	MENT/1000	
INDUSTRY/SECTOR EXPERTS		
AGRO-PROCESSING AND AGRICULTURE	AGRO/1000	
BASIC METALS AND MINING	BMM/1000	
BASIC AND SPECIALTY CHEMICALS	BSC/1000	
CLOTHING & TEXTILES	TEXTILES/1000	
HEAVY MANUFACTURING	HEAVYMAN/1000	
CHEMICAL PRODUCTS & PHARMACEUTICALS	CPP/1000	
MACHINERY & EQUIPMENT	MACHEQU/1000	
LIGHT MANUFACTURING & TOURISM	LMANT/1000	
AUTOMOTIVE & TRANSPORT EQUIPMENT	AUTOMOTIVE1000	
INDUSTRIAL INFRASTRUCTURE	INDUSTRIALIN/1000	
MEDIA AND MOTION PICTURES	MEDIA/1000	
NEW INDUSTRIES	NEWIND/1000	
SOCIO ECONOMIC DEVELOPMENT	SED/1000	
WORKOUT & RESTRUCTURING	W&R/1000	
ENVIRONMENTAL, HEALTH & SAFETY	EHS/1000	

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 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 4 – 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 **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 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 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 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 – Pricing Schedule

The bidder must complete the Pricing Schedule below which must be submitted with the bid response as part of 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 Bidder’s Experience and the proposed Project Team

Request for Proposal No: _____

Name of Bidder: _____

Service Category _____

Code _____

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 3.]

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:

Client' Name	Project description	Project Cost	Project period (Start Dates)	Project period (End Dates)	Description of service performed i.e. client's challenge/problem, how the bidder intervened, what the outcome of the intervention was	Name, title and telephone contact of client

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

Name	Position	Qualifications	Professional registration with applicable body (indicate the Body)	Role / Duties in this Project	Relevant Project Experience	
					Project description, Client, Project period	Project Cost

Table (C) Details of the bidder's current and past experience in working with youth entrepreneurs

Client' Name	Project description	Project Cost	Project period (Start Dates)	Project period (End Dates)	Description of service performed i.e. client's challenge/problem, how the bidder intervened, what the outcome of the intervention was	Name, title and telephone contact of client

Annexure 8 – Specifications

The Business Support Programme requires the services of suitably experienced service providers to render services in the below mentioned categories:

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
<p>General Business Support</p>	<ul style="list-style-type: none"> • Assist prospective clients with enhancement of their business plans • Provide managerial advice to existing clients in all management functions (general management, strategy, marketing, human capital, operations, financial management, etc.) to enhance their performance and promote sustainability • Business set-up and development • Business simulation and training 	<p>GEN/1000</p>
<p>Functional Management Areas</p>	<p>Bidders must specify which functional areas they are applying for and provide evidence of experience.</p> <ul style="list-style-type: none"> • Corporate governance • Policy development • Process development and mapping • Business strategy development • Business diagnosis • Business Turnaround strategy and implementation • Business process reengineering • Productivity improvement (Kaizen and 5S activities) • Quality certification or accreditation • Change management • Human capital • Leadership team development • Leadership competency assessment • Board and management strategic effectiveness alignment • Board and senior management evaluation • Financial, management and cost accounting • Financial Management • Preparation and auditing of financial statements • Enterprise Resource Planning (ERP) systems provision, installation and training • Information Technology support systems provision, installation and training • Marketing strategy development and implementation • Market research/studies and market analysis • Business and market development • Development and implementation of sales framework (sales planning, strategy, forecasting, monitoring, establishment of distribution networks etc.) 	<p>FUN/1000</p>

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
	<ul style="list-style-type: none"> • Expertise in penetrating export markets • Expertise in commercialising and managing new innovations 	
Mentorship and Coaching	<ul style="list-style-type: none"> • Agree on the mentorship objectives with the mentee • Handhold, guide and direct the mentee towards achieving agreed objectives • Provide support and opportunities for development, and help the mentee to address issues and challenges identified • Impart knowledge and skill to help the mentee grow and fulfil his/her potential • Bring in coaches on an ad-hoc basis to impart knowledge and skills to the mentee within specific disciplines • Maintain a medium to long-term developmental relationship with the mentee until mentorship objectives are achieved 	MEN/1000
Industry, sector and sub-sectoral expertise is required in the below mentioned categories:		
Agro-processing and Agriculture	<ul style="list-style-type: none"> • Animal farming and dairy farming • Poultry farming & hatchery • Growing of crops combined with farming of animals • Agricultural and animal husbandry services • Forestry and related services • Logging and related services • Ocean and coastal fishing • Fish hatcheries and fish farms • Production, processing & preserving of meat • Processing and preserving of fish & fish products • Processing and preserving of fruit and vegetables • Vegetable and animal oils and fats • Manufacture of dairy products • Grain mill products • Manufacture of starches and starch products • Prepared animal feeds • Bakery products • Sugar, including golden syrup and castor sugar • Cocoa, chocolate and sugar confectionery • Macaroni, noodles, couscous and farinaceous products • Distilleries and wineries • Beer and other malt liquors and malt • Soft drinks; production of mineral waters 	AGRO/1000
Basic Metals and Mining	<ul style="list-style-type: none"> • Mining of coal and lignite • Mining of gold and uranium ore • Mining of metal ores, excl. gold and uranium • Mining of iron ore • Chrome mining • Copper mining • Manganese mining • Platinum group metals 	BMM/1000

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
	<ul style="list-style-type: none"> • Other metal ore mining, except gold and uranium • Other mining and quarrying • Dimension stone (granite, slate and wonderstone) • Other stone quarrying; stone crushing and clay pits • Mining of diamonds including alluvial diamonds • Mining of chemical and fertilizer minerals • Services incidental to mining of minerals • Basic iron and steel • Basic precious and non-ferrous metals • Casting of iron and steel • Casting of non-ferrous metals • Structural metal products • Forging, pressing, stamping & roll-forming of metal • Cutlery, hand tools and general hardware • Other fabricated metal products • Mineral testing laboratory services 	
Basic and Specialty Chemicals	<ul style="list-style-type: none"> • Extraction of crude petroleum and natural gas • Services incidental to oil and gas extraction • Manufacture of coke oven products • Petrol, lubricating oils and greases, from crude oil • Petrol, lubricating oils and greases ,from coal • Petrol, lubricating oils, greases, from natural gas • Lubricating oils and greases from organic products • Compounded and blended lubricating oils and grease • Other petroleum/synthesized products • Processing of nuclear fuel • Basic chemicals, except fertilizers • Fertilizers and nitrogen compounds • Plastics in primary form and synthetic rubber • Specialty chemicals manufacture processes 	BSC/1000
Clothing & Textiles	<ul style="list-style-type: none"> • Preparation, spinning and weaving of textile fibre • Finishing of textiles • Made-up textile articles, except apparel • Carpets, rugs and mats • Cordage, rope, twine and netting • Other textiles • Knitted and crocheted fabrics and articles • Wearing apparel, except fur apparel • Tanning and dressing of leather • Luggage, handbags, saddlery and harness • Manufacture of footwear 	TEXTILES/1000
Heavy Manufacturing	<ul style="list-style-type: none"> • Sawmilling and planing of wood • Veneer sheets, plywood, laminboard, particle board • Manufacture of builders' carpentry and joinery <ul style="list-style-type: none"> • Manufacture of wooden containers 	HEAVYMAN/1000

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
	<ul style="list-style-type: none"> • Other wood, cork, straw and plaiting material product • Manufacture of pulp, paper and paperboard • Corrugated paper, paperboard, paper containers • Other articles from paper and paperboard • Rubber tyres and tubes; retreading and rebuilding • Other rubber products • Glass and glass products • Non-structural non-refractory ceramic ware • Refractory ceramic products • Structural non-refractory clay & ceramic products • Cement, lime and plaster • Articles of concrete, cement and plaster • Cutting, shaping and finishing of stone • Other non-metallic mineral products • Recycling of non-metal waste 	
Chemical Products & Pharmaceuticals	<ul style="list-style-type: none"> • Pesticides and other agro-chemical products • Paints, varnishes and similar coatings • Pharmaceuticals, medicinal chemicals, botanical prod • Soap, detergents, perfumes and toilet preparations • Other chemical products • Manufacture of man-made fibres • Manufacture of plastic products 	CPP/1000
Machinery & Equipment	<ul style="list-style-type: none"> • Tanks, reservoirs and similar containers of metal • Manufacture of steam generators • Engines and turbines, except aircraft and vehicle • Pumps, compressors, taps and valves • Bearings, gears, gearing and driving elements • Ovens, furnaces and furnace burners • Manufacture of lifting and handling equipment • Other general purpose machinery • Agricultural and forestry machinery • Manufacture of machine tools • Machinery for metallurgy • Mining, quarrying and construction machinery • Machinery for food, beverage and tobacco processing • Machinery for textile, apparel & leather production • Other special purpose machinery • Manufacture of household appliances • Electric motors, generators and transformers • Electricity distribution and control apparatus • Manufacture of insulated wire and cable • Accumulators, primary cells and primary batteries • Manufacture of other electrical equipment 	MACHEQU/1000
Light Manufacturing	<ul style="list-style-type: none"> • Electric lamps and lighting equipment 	LMANT/1000

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
& Tourism	<ul style="list-style-type: none"> • Office, accounting and computing machinery • Radio, television and communication equipment • Electronic valves and tubes and other components • Manufacture of television- and radio transmitters • Manufacture of television and radio receivers • Medical & surgical equipment, orthopaedic appliance • Measuring, checking, testing and navigating appliance • Industrial process control equipment • Optical instruments and photographic equipment • Watches and clocks • Furniture • Manufacture of jewellery • Musical instruments • Sports goods • Games and toys • Other manufacturing • Hotels, camping sites and other short-stay accommodation 	
Automotive & Transport Equipment	<ul style="list-style-type: none"> • Manufacture of motor vehicles • Motor vehicle bodies; trailers and semi-trailers • Manufacture of motor parts and accessories • Building and repairing of ships • Building & repairing of pleasure & sporting boats • Railway and tramway locomotives • Aircraft and spacecraft • Motor cycles • Bicycles and invalid carriages • Other transport equipment 	AUTOMOTIVE1000
Industrial Infrastructure	<ul style="list-style-type: none"> • Cargo handling • Sea and coastal water transport • Transport via pipelines • Storage and warehousing • Other supporting transport activities • Telecommunication 	INDUSTRIALIN/1000
Media and Motion Pictures	<ul style="list-style-type: none"> • Motion picture production and distribution • Motion picture • Radio and television activities • Script review • Budget analysis • Review of newly completed films i.e. edit and post production • Producer and Director mentors • Script editing assistance of putting the film together • Other entertainment activities 	MEDIA/1000
New Industries	The following services may be required in businesses at various	NEWIND/1000

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
	<p>stages of maturity (from start-up through to growth-stage), in a variety of new industries (as per the New Industries Strategic Business Unit's focus areas) and across the value chains of those new industries:</p> <ul style="list-style-type: none"> • Assisting the CEO and/or other executive management team members in effectively managing their business (or any specific function within the business) from a tactical (day-to-day) and/or strategic perspective • Advising / coaching them on how to perform these functions themselves; • Implementing training / up-skilling interventions for the CEO / executive management team members as required. 	
<p>Socio Economic Development</p>	<p>Appointed service providers to be included in the panel of consultants must possess the following:</p> <ul style="list-style-type: none"> • A legally registered company in terms of South African legislations. • The Company must have Professional lawyers, hands on experience on facilitation of the formation and registration of Trusts, Co-operatives and any similar entities. • Facilitation skills; • Presentation skills; • Ability to communicate with different Official languages; • Willing to travel extensively and work with workers in different economic structures; • Interpersonal skills; • In-depth understanding of community and employee ownership • Knowledge of employee / workers / community structures; • Experience of working with employees / workers / communities; • Ability to conduct socio economic needs / community profiling etc • Ability to conduct research in the field of employee and community ownership • Ability to understand various business sectors; • Training experience with regard to Trust Management, financial management and Co-operatives Management Structures; 	<p>SED/1000</p>
<p>Workout & Restructuring</p>	<ul style="list-style-type: none"> • Crisis Stabilization or short-term survivability • Longer term viability based on high level industry specific assumptions • Detailed turnaround plan or restructuring solution • Vast financial restructuring expertise. • Recovering • Business rescue • Restructuring solutions 	<p>W&R/1000</p>

SERVICE CATEGORIES	SCOPE OF SERVICES	CODES
	<ul style="list-style-type: none"> • Complex turnaround management of distressed companies • Turnaround expert with proven track record in fund management and ability to raise funding for distressed companies • Members of an accredited turnaround body such as TMA, SARIPA or Business Rescue Practitioners • Knowledge of PFMA will be an added advantage 	
Environmental, Health & Safety	<ul style="list-style-type: none"> • Environmental and/or Social Impact Assessments (EIAs) • Safety Health and Environmental Assessments. • Health and Safety Programs Implementation (OHS Act Compliance) • Energy Efficiency Audit • Greenhouse gas emission assessments (disclosure and/or carbon tax) • Water consumption assessments • Water Quality Testing Service 	EHS/1000

Annexure 9 – 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 10 – Service Level Agreement (SLA)

Bidders must refer to annexure 10 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.