



T09/06/16

**REQUEST FOR PROPOSAL TO
CONDUCT A STUDY ON MAXIMISING
THE INDUSTRIAL POTENTIAL OF
SOUTHERN AFRICA'S PETROLEUM
RESOURCES**

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

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SECTION 1: GENERAL CONDITIONS OF BID

1. Proprietary Information

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

2. Enquiries

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

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

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 04 July 2016**.
- 2.3 The enquiries will be consolidated and IDC will issue one response and such response will be posted, within two days after the last day of enquiries, onto the IDC website (www.idc.co.za) under tenders i.e. next to the same RFP document.
- 2.4 The IDC may respond to any enquiry in its absolute discretion and the bidder acknowledges that it will have no claim against the IDC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

3. Bid Validity Period

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

4. Instructions on submission of Bids

- 4.1 Bids should be submitted in duplicate (2 hard copies) and one electronic copy (on CD) in PDF format all bound in a sealed envelope endorsed, **T09/06/16: Request for Proposal to conduct a study on maximising the Industrial Potential of Southern Africa's Petroleum Resources**. 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, 12 July 2016**.
- 4.2 Bids must be submitted in the prescribed response format, herein reflected as **Response Format**.
- 4.3 The bid closing date, bidder name and the return address must also be endorsed on the envelope.
- 4.4 If a courier service company is being used for delivery of the bid response, the bid description must be endorsed on the delivery note/courier packaging and the courier must ensure that documents are placed / deposited into the bid box. **The IDC will not**

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

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

5. Preparation of Bid Response

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

6. Supplier Performance Management

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

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

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

7. Supplier Development

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

8. IDC's Rights

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

9. Undertakings by the Bidder

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

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

10. Reasons for disqualification

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

11. Local Production and Content

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

12. Response Format (Returnable Schedules)

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

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

- 12.3.1 Original and valid Tax Clearance Certificate(s) (TCC);
- 12.3.2 Originally certified copies of bidder's CIPC company registration documents listing all members with percentages, in case of a CC.
- 12.3.3 Copy of Board Resolution, duly certified;
- 12.3.4 Originally certified copy of ID document for the Company Representative
- 12.3.5 Annexure 2 of this RFP document (duly completed and signed);
- 12.3.6 Annexure 3 of this RFP document (duly completed and signed);
- 12.3.7 Annexure 4 of this RFP document (duly completed and signed);
- 12.3.8 Latest Audited Financial Statement
- 12.3.9 B-BBEE verification certificate indicating the contribution level of the bidding entity. An Exempted Micro Enterprises (EME) with an annual turnover less than R10 million, is only required to obtain a sworn affidavit confirming the annual total revenue and level of black ownership. An EME that has at least 75% black beneficiaries qualifies for elevation to "Level One Contributor" and an EME that has at least 51% black beneficiaries qualifies for elevation to "Level Two Contributor". Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above (12.3.1-12.3.7) must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).
- 12.3.10 Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)
- 12.4 Schedule 3:**
 - 12.4.1 Response to Section 2 of this document, in line with the format indicated in this RFP document.
 - 12.4.2 Annexure 5 of this RFP document, duly completed and signed
 - 12.4.3 Annexure 6 of this RFP document, duly completed and signed
- 12.5 Schedule 4: Price Proposal (response to Section 3 of this RFP document) (Must be submitted in a separate envelope within the sealed envelope of the bid)**
- 12.6 One (1) CD with all Schedules listed above, also included in the sealed envelope of the bid**

13. Evaluation Criteria and Weightings

Bids shall be evaluated in terms of the following process:

13.1 Phase 1: Initial Screening Process: During this phase, bid responses will be reviewed for purposes of assessing compliance with RFP requirements including the general bid conditions, which requirements include the following:

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

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

13.2 Phase 2: Technical/ Functionality Evaluation

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

13.2.1 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:

ELEMENT	WEIGHT
Bidder's Relevant Experience	20
Bidder's Proposed Methodology	15
Experience, Skills and Qualifications of the key personnel	20
Skills Transfer	5
Presentations	40
TOTAL	100%

Note: Bidders who score 42 points out of 60 points (70%) or more in total in other functional/technical requirements will be required to further provide presentation at the IDC head office in Sandton for further evaluation purposes.

All bids that fail to achieve the minimum overall qualifying score of 70% in other functional/technical requirements including the presentation will not be considered for further evaluation on Price and BEE

13.3 Phase 3: Preference Point System

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

CRITERIA	POINTS
Price	90
B-BBEE	10
TOTAL	100 points

14. Promotion of Emerging Black owned Service Providers

It is the IDC's objective to promote transformation 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. Background Information

Historically, South Africa has been a mining jurisdiction with petroleum activity generally confined to exploration, downstream refining and liquid fuels distribution. Indeed, South Africa has limited oil reserves of just 20 million barrels and proven gas reserves of approximately 0.57 trillion cubic feet ("tcf"). This is about to change dramatically. With the discovery of potentially large-scale onshore unconventional gas reserves and the expectations of substantial near-term offshore crude and gas discoveries off the back of historic finds in neighbouring waters, South Africa is poised to transform into a petroleum jurisdiction.

Similarly, the Southern and Eastern African region, known for mining, is likewise becoming a petroleum region, led by recent large-scale petroleum discoveries. Those recent large-scale discoveries have the potential to be a game changer for individual jurisdictions and the wider region. Technically recoverable resources in the Karoo shale gas fields alone are estimated to be as great as 390 tcf. In addition, substantial potential coal bed methane resources are in the process of being brought towards commercial development. Offshore potential, particularly in deep water, can be seen clearly by the substantial increase in farm-in and exploration activity over the past few years and in exploration drilling campaigns planned for the near future.

3. Purpose

The purpose of this tender is to appoint a service provider that has a technical industry expert that will oversee the incorporation of a dedicated gas unit while at the same time ensuring the action items from phase 1 of this process are implemented through the current dti-led working group. In light of the opportunities presented in the regional natural gas sector, the Department of Trade and Industry (the "dti") instituted, in the last financial year, a gas industrial policy project aimed at developing a framework and foundation for the development of an appropriate and long-term natural gas industrialisation policy for South Africa which would maximise the multiplier effects of the natural gas resources domestically and in the Southern Africa region (the "Project"). Appropriate natural gas

industrial policy will allow South Africa to optimise the utilisation of natural gas, maximise its multiplier effect potential and drive regional integration.

Phase I of the Project involved the appointment of a dti led Working Group (the "WG") comprising of industry experts who were mandated with developing a framework and foundation for an appropriate long-term natural gas industrialisation policy for South Africa that would use and maximise the multiplier effects of natural gas resources, both in the Southern African region and domestically, whilst playing a significant role in regional integration. Phase I of the Project was facilitated by an independent service provider, which managed the WG, arranged regional and international fact finding missions, developed an engagement strategy with key regional and international public and private sector players and conducted specific research and policy development work which included:

1. An assessment of the petroleum industry's potential impact including:
 - Infrastructure development;
 - Employment;
 - Benefits for the fiscus and other local stakeholders; and
 - Local partners for major projects;
2. An examination of the use of policy levels to:
 - Maximise the multiplier effect of gas development and utilisation domestically and regionally;
 - Identify and enable the development of related subsidiary industries which would supply goods and services to the upstream gas industry both domestically and regionally;
3. An assessment of the need for regulatory and legislative amendments, which would facilitate the implementation of policy and, in particular, facilitate consultations with other government departments including the Department of Mineral Resources, Department of Environmental Affairs and Department of Water Affairs to foster the optimal integrated regulatory regime;
4. Assess and advise on South Africa's role within the Southern African region and provide advice on strategic objectives in regard to engagement with other governments within the Southern African region;
5. Assess the need to develop a skills development / training policy and suggest regulatory reforms which would help coordinate skills development / re-training initiatives across research and tertiary institutions in collaboration with the Department of Higher Education and the Department of Science and Technology;
6. Assess and advise on policies which would facilitate the development of new technologies and intellectual property in the gas sector which are appropriate to South Africa's needs and demands within the Southern African region, to inform an investment promotion strategy;
7. Assess and advise on synergies between the dti policy options and Gas Utilisation Master Plan (GUMP) including delineating the overall role of the dti in South

Africa's gas economy and coordinating with the GUMP and the Department of Energy's IPP Unit;

8. Assess opportunities for the development of the services sector;
9. The development of a service hub focussed primarily on the upstream petroleum sector including an analysis of the policy levers that must be implemented to take advantage of such development; and
10. Assess and advise on how the development of South Africa's and the region's petroleum resources would be best used to augment the Industrial Policy Action Plan ("**IPAP**").

Phase II of the Project will focus on establishing the requisite institutional infrastructure that implements the long term strategic programme, developed over the previous financial year, to maximise the multiplier effects of recently discovered Southern African natural gas resources. The successful Service Provider will be required to:

- oversee and manage the formation of a Gas Industrialisation Unit ("**GIU**");
- develop an appropriate funding mechanism for the GIU;
- Facilitate arrangements with the DoE's IPP office and the **dti's** WG relating to the DoE's Gas IPP programme and its potential implications for a gas based industrialisation strategy;
- Facilitate arrangements/ memoranda of understanding with other South African and regional government departments in relation to gas industrial policy;
- Facilitate key strategic engagements with various players in the Oil & Gas industry, GIU, CSIR relating to supplier development and local content; and
- Facilitate key strategic engagements with local, regional and international tertiary and training institutions.

This document delineates the parameters of the Project and specifies the scope of work and, the qualifications and expertise required of the successful Service Provider. Naturally, the Service Provider will have to work closely with the office of the DDG: IDD and the WG to ensure the efficient running and alignment of the Project with the goals of **the dti**.

4. Project Objectives

The objectives of Phase II in general are to ensure that the tasks identified in Phase I are executed as efficiently and effectively as possible. More specifically, the objectives of this phase are to manage the transition of the WG to a formalized implementing entity while at the same time implementing certain tasks utilizing the current structure of the WG.

Phase I of the Project consisted of a detailed and intense investigation into the nuances of developing and implementing a gas based industrialisation strategy. During this process it became evident that a gas based industrialization strategy needs to focus on, notwithstanding other considerations, the following areas:

- Appropriate gas utilisation for the South African and regional economies;
- Concrete collaborative regionalisation projects underpinned by gas;
- Driving the establishment of South Africa as a hub for the oil and gas services sector in the region;
- Assessment of appropriate utilisation value chains - gas-to-power will drive the initial stages of development of the domestic gas economy- but other gas utilisation value chains will need to be appropriately sequenced;
- Consideration and implementation of impactful incentives for industry development that have minimal impact on the State balance sheet;
- Technology and innovation: potential to leapfrog other gas jurisdictions from a technology and innovation perspective.

Phase I of the Project unpacked each of these areas in great detail and identified key tasks that need to be executed to advance each of these areas.

5. Scope of Work

The scope of work for this tender is to appoint a service provider that will be required to provide the following:

- Determine the appropriate form of the formalized GIU from both a regulatory and commercial perspective;
- Identify and leverage local and international funders and partners to ensure that the GIU is fully resourced both financially and technically by the beginning of the 2017/18 financial year;
- Leverage relationships within the Mozambican government and the Oil & Gas sector to fast track the identification of concrete projects that would enable government to government co-operation. It is important that these projects be seen as win-win situations for all countries;
- Facilitate and drive engagements with the DoE and the IPP-Office Gas IPP to identify optimal gas utilization scenarios beyond gas-to-power. Thus facilitating the development of a broader gas economy;
- Utilize relationships with the international Oil & Gas industry (including field service business and industry association both locally and internationally) to unpack the various on-shore and offshore gas value chains with the objective of determining, in a robust and systematic manner, an appropriate role for South African industry. Phase I of the Project has already identified a number of areas, thus, this investigation goes beyond a superficial analysis into whether or not things are technically possible. The Service Provider should be able to leverage their relationships with the international oil & gas industry to explore potential partnerships with capable South African industrial players.

6. Project Deliverables

During the envisaged term of the Project, the Service Provider, in consultation with the DDG: IDD of the dti and the WG, will be required to:

- Establish the GIU and develop an appropriate funding model for the Project going forward. In this regard, it should be noted that Service Provider must be able to advise on an appropriate form of the GIU from both a regulatory and commercial perspective bearing in mind that GIU must be able to accept funding from a range of public and private sources (including local and foreign public and private sources), appoint contractors/consultants as and when required to perform particular tasks which it may not wish to perform itself;
- Leverage relationships within the Mozambican government and the Oil & Gas sector to fast track the identification of concrete projects that would enable government to government co-operation. It is important that these projects be seen as win-win situations for both countries;
- Facilitate arrangements with the DoE's IPP office and the dti's WG relating to the DoE's Gas IPP programme and its potential implications for a gas based industrialisation strategy;
- Facilitate arrangements/ memoranda of understanding with other South African and regional government departments in relation to gas industrial policy; Facilitate key strategic engagements with various players in the Oil & Gas industry, GIU, CSIR relating to supplier development and local content; and
- Facilitate key strategic engagements with local, regional and international tertiary and training institutions.
- The DoE through its IPP-office has announced the imminent roll out of its Gas to Power programme within the ports of Saldanha, Coega and Richards Bay. This programme provides the ideal anchor for the development of a broader gas-based economy. The Service Provider will therefore be required to generate advice on appropriate gas based industrial projects that can be located within these ports thus, leveraging the DoE's gas to power and the dti's SEZ programmes.
- Provide detail methodology that clearly articulates the process that would have to be followed if South Africa were to translate certain technical capabilities, with respect to at least two vital inputs along the gas value chain, into a reality. In other words this methodology must move beyond the simple finding that something is technically possible to one that articulates exactly how government in partnership with the private sector is able to localise a particular commodity as competitively as is possible.

7. Skills Transfer

The Service Provider will be required to demonstrate that a substantial portion of its core team is made up of Historically Disadvantaged South African's (HDSAs) so as to benefit and provide skills to South Africa generally in the petroleum industry. In addition, the Service Provider will provide skills-transfer to build the dti human resources capacity in the petroleum sector and will include providing research training for nominated staff members of the dti.

8. Project Timelines

The appointed service provider(s) will be required to start immediately after signing the contract and provide the services for a period of twelve (12) months.

9. Technical Evaluation Criteria

9.1 Other Technical Requirements

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

9.1.1 BIDDER'S EXPERIENCE IN GAS AND OIL INDUSTRIES	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate relevant experience in conduction research studies in oil & gas industries.</p> <p>The bidder must provide at least three (03) relevant contactable reference working on oil & gas commercial transactions, specifically in the up, mid and downstream sectors as well as policy and regulatory matters in Southern Africa.</p> <p>The bidder must also provide two (2) references in relation to its work in South Africa and at least one (1) reference in relation to its work in Mozambique.</p> <p>Please refer to Table (a) of Annexure 3 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

9.1.2 BIDDER'S PROPOSED METHODOLOGY	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate thorough understanding of the objectives and deliverables of this project.</p> <p>The bidder must provide a detailed proposal of the methodology/ approach to be used to carry out the scope of work outlined above and clearly demonstrating how the study will be achieved. The proposal must outline, amongst other things, the following:</p> <ul style="list-style-type: none"> • Data collection methods and sources/ tools • Data analysis • Desktop Research • Stakeholder engagement 			
Substantiate / Comments			

9.1.3 QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>The bidder's key personnel of the proposed team must have significant international experience in the petroleum industry.</p> <p>Members of the project team should collectively have the following experience:</p> <ul style="list-style-type: none"> • Display a deep understanding of the LNG industry and experience of actual LNG projects. • Display an understanding of and have experience with the development of non-power related gas utilisation value chains. • Must have the necessary international experience with 80% of the project team based on the ground in South Africa. • Demonstrable experience working on oil & gas transactions and policy as well as regulatory matters in the East and Southern African region. <p>The bidder must provide a structure and composition of the proposed team, clearly outlining the main disciplines/ specialties of this project and the key personnel responsible for each specialty. Please refer to Table (c) Annexure 3 of this document for the format in which the required information must be provided.</p> <p>The bidder must provide CVs of the key personnel and the team; and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above.</p>			
Substantiate / Comments			

9.1.4 SKILLS TRANSFER	Comply	Partially Comply	Not Comply
<p>The bidder is required to submit together with their proposal a skills-transfer plan to build the dti human resource capacity in the petroleum sector. As a minimum, this should involve providing research training to a maximum of two (2) nominated staff member(s) of the dti.</p>			
Substantiate / Comments			

9.1.5

Shortlisted bidders will be required to provide a presentation to the evaluation team. The presentation must cover but not limited to the following:

Presentation	Maximum points
Interpretation and understanding of the ToR	30
Proposed approach/ methodology	10

SECTION 3: PRICE PROPOSAL

SECTION 3: Cost Proposal

1 Please indicate your total bid price here: R..... (VAT Excl.)

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

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

YES	NO
-----	----

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

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

5

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

6

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

7

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

8 COSTING MODEL

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Planning Phase				
Establish the GIU and develop an appropriate funding model for the Project				
Leverage relationships within the Mozambican government and the Oil & Gas sector				

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Facilitate arrangements with the DoE's IPP office and the dti's WG relating to the DoE's Gas IPP programme				
Facilitate arrangements/ memoranda of understanding with other South African and regional government departments in relation to gas industrial policy				
Facilitate key strategic engagements with local, regional and international tertiary and training institutions				
Generate advice on appropriate gas based industrial projects				
Deliver a methodology that clearly articulates the process that would have to be followed if South Africa were to translate certain technical capabilities				
Skills transfer to two (2) dti employees				
Disbursements				
Total Bid Price (VAT Excl.)				

Notes on pricing:

- **Disbursements (incidental expenses other than professional fees e.g. travel and accommodation, printing costs, venue hire, and equipment hire etc.) must be clearly defined, outlining all assumptions. It is of utmost importance to submit clear and comprehensive cost proposals to allow the IDC to fairly compare bid price / cost proposals. If there is no additional fee envisaged for Disbursements, then the bidder must clearly indicate "No Charge / Free of Charge". Failure to clearly indicate this, would result in IDC penalising your bid response by taking the cost of the highest bidder and adding 50% thereto and apply this rate for purposes of price comparisons.**

Bidders are therefore requested to respond clearly and comprehensively on this aspect of their bid response.

- The bidder must provide a detailed breakdown of the Disbursements as follows:

Cost Element	Cost (VAT Excl.)
Total Disbursements	

9 SUMMARY OF THE PROPOSAL

DESCRIPTION	BIDDER'S PROPOSAL
Number of resources (personnel)	
Project duration (in hours)	
Project duration (in months)	
Commencement Date	

Price Declaration Form

Dear Sir,

Having read through and examined the Request For Proposal (RFP) Document, RFP no. **T09/06/16**, the General Conditions, and all other Annexures to the RFP Document, we offer to conduct a study on maximising the Industrial Potential of Southern Africa's Petroleum Resources to the IDC at the following total amount:

R..... (Excluding VAT)

In words

R..... (Excluding VAT)

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

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

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

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

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF: COMPANY NAME

Tel No

Fax No

Cell No

SECTION 4: ANNEXURES

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

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised Signatory _____

Position of Authorised Signatory _____

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

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

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

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

Supplier Number	
Unique registration reference number	

BIDDING STRUCTURE

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

REQUIRED INFORMATION

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

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

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

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

Annexure 2 - Supply chain management practices questionnaire

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

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

The bidder must complete the following questionnaire.

Bidder's past supply chain management practices:

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

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

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

Name of Company: _____

Company Registration Number: _____

Company VAT Registration Number: _____

Signature

Date

Annexure 3 – Declaration of Interest

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

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

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

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

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:.....

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

2.4 Company Registration Number:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

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

¹“State” means –

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

(b) any municipality or municipal entity;

(c) provincial legislature;

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

(e) Parliament.

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

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

2.7.1 If so, furnish the following particulars:

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

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

.....

Position occupied in the state institution:

.....

Any other particulars:

.....

.....

.....

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

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

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

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

.....

.....

.....

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

business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

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

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

YES / NO

2.9.1 If so, furnish particulars.

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

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

YES / NO

2.10.1 If so, furnish particulars.

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

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

YES/NO

2.11.1 If so, furnish particulars:

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

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

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

1. DECLARATION

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

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

.....
Signature Date

.....
Position Name of bidder

Annexure 4 – Shareholders and Directors Information

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

5.1 Current Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% shares

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

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

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

5.3 Directors

Name of the shareholder	ID Number	Race	Gender

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Table (b) Details of the key personnel of the bidders' proposed team:

Name	Position	Role / Duties in this Project	Relevant Project Experience	
			Project description, Client, Project period	Project Cost

Annexure 6 – BEE COMMITMENT PLAN

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

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