



T20/08/17

**REQUEST FOR PROPOSAL FOR
DEVELOPMENT OF THE COMMERCIAL
AEROSPACE INDUSTRIAL STRATEGY**

**BID CLOSING DATE: WEDNESDAY, 23
AUGUST 2017 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 Shirley Mampuru</u>
Telephone Number:	<u>+27 11 269 3583</u>
Email address:	<u>shirleym@idc.co.za</u>

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 15 August 2017**.
- 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, **T20/08/17: REQUEST FOR PROPOSAL FOR DEVELOPMENT OF THE COMMERCIAL AEROSPACE INDUSTRIAL STRATEGY**. The sealed envelope must be placed in the bid box at the Main Reception area of the IDC Building, 19 Fredman Drive Sandton by no later than 12:00 noon on Wednesday, 23 August 2017.
- 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 will be required to make such presentation within five (5) days from the date the bidder is notified of the presentation. 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 Response to Annexure 6: BEE Commitment Plan
- 12.3.10 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. A Qualifying Small Enterprise (QSE) that has 51% or more black beneficiaries may obtain a sworn affidavit confirming the annual total revenue and level of black ownership. If a bidder is a Joint Venture or Consortium, the bidder must submit a consolidated B-BBEE scorecard as if they were a group structure. 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 (12.3.1-12.3.8) must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).
- 12.3.11 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
- 12.5 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 12.3.10 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: Invitation to Bid
 - Annexure 3: Supply Chain Management Questionnaire
 - Annexure 4: Declaration of Interest
 - Annexure 5: Certificate of Independent Bid Determination
 - Annexure 6: Shareholders' Information/ Group Structure
 - Annexure 7: Bidders Experience & Project Team
 - Annexure 8: BEE Commitment Plan

13.2.1 Annexure 7: Declaration Form for Local Content

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:

13.2.2 **Mandatory Functional/ Technical Requirements**

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

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

13.2.3 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
Executive summary explaining the Bidder’s understanding of the IDC’s RFP requirements and a summary of the bidder’s proposal.	5
Bidder’s relevant experience	20
Proposed Methodology	20
Qualifications and Skills of key personnel	15
Project Plan	5
Skills Transfer Plan	5
Presentations	30
TOTAL	100%

Note: The bidder must score a total of at least 49.00 points on interpretation of the scope of work, experience of the bidder and the team, proposed methodology in order to qualify for the presentations.

The minimum qualifying score for functionality is 70%. All bids that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and BEE, in Phase 3.

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	80
B-BBEE	20
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

SPECIFIC CONDITION OF BID

1. Bid Pre-qualification criteria

- 1.1 In terms of Regulation 4 of the 2017 PPPFA Regulations, the IDC requires that bidders meet the following pre-qualification criteria:
 - Bidders must have a minimum B-BBEE contributor status level of 4 or better.
- 1.2 The IDC will only consider a bid if the relevant bidder meets these pre-qualification criteria. Where a bidder fails to meet these pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from adjudication.

FUNCTIONAL REQUIREMENTS SPECIFICATION

2. Special instructions to bidders

- 2.1 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.
- 2.2 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.
- 2.3 Failure to comply with Mandatory Requirements may lead to the bidder being disqualified.

3. Background Information

The globalization of supply chains, evolving market conditions and the advent of disruptive trends associated with "Industry 4.0" require that the SA Government and the SA Aerospace Manufacturing export-focused companies, including those performing Maintenance, Refurbishment and Overhaul (MRO), to co-operate even more closely than before to maintain and expand their share of this important part of the Advanced Engineering Sector. In this instance the parties intend to develop a Strategy and Framework which will serve as a Proof of Concept to establish a future-orientated South African Industrial Policy Framework, which also incorporates critical enablers to deal with Aerospace related challenges and opportunities.

The SA Government has recognized the importance of the Aerospace Industry and consequently has over a decade been active in its support, through a wide range of complementary mechanisms including National Industrial Participation Programme (NIPP) and Defence Industrial Participation (DIP). It has also assigned certain roles to various departments such as **the dti**, Department of Public Enterprises (DPE), Department of Science and Technology (DST), Department of Transport (DoT), as well as established Industry Initiatives i.e. Aerospace Industry Support Initiative (AISI), Centurion Aerospace Village (CAV) and Council for Scientific and Industrial Research (CSIR) to ensure adequate growth.

Aerospace is the art of aeronautics, being the design, development, production, operation, use and maintenance of vehicles moving through air and space. It consists of a range of stakeholders in general aviation; commercial aviation; military aviation; air traffic management; aircraft material parts and components; system manufacturing, integration, propulsion avionics, sensors, Information and Communication Technology (ICT) systems, MRO, research and technology, including university and science council based fundamental research into new technologies and materials e.g. titanium and composites for light structure. Given the increased overlap between products intended for defence and civilian use, both nationally and internationally, aerospace industry also includes those which produce defence equipment or products by making use of civilian technologies, or which manufacture dual-use products, which can be sold in both the defence and non defence markets.

4. Purpose

The purpose of this study is to:

- 4.1 Identify major opportunities for the South African Commercial Aerospace Manufacturing Industry in the domestic and export markets and then develop an Industrial Development Strategy for the domestic and international markets including recommendations on how these opportunities should be approached by the industry and the dti.
- 4.2 Develop a framework for growth of Aviation manufacturing sector to:
 - Understand how capital and operating expenditures in this sector contribute to local, regional, and national economies as measured by gross domestic product (GDP), employment and tax revenue;
 - Consider transformation of various aspects of the Sector including Ownership, Skills- and Supplier Development with particular emphasis on Black Industrialization;
 - Understand Change Drivers to be considered for Manufacturing with specific emphasis being placed on the Commercial Aviation Manufacturing as primary focus area;
 - Develop a holistic Industrial Development Framework to account, in particular, to fulfil the requirements of future-orientated Advanced Manufacturing Technologies related to Commercial Aviation Manufacturing; and
 - Investigate the feasibility and broader benefits of a Bi-lateral Growth Agreement between Government and the Private Sector.

The successful bidder should conduct research; consolidate data analysis; and research findings supplemented by recommendations that will be used by **the dti** and industry in the development and advancement of the Commercial Aerospace Industry in South Africa.

5. Problem Statement

The South African Commercial Aerospace Industry has successfully entered the global market through its exports and global partnerships with many of the world's leading aerospace Original Equipment Manufacturers (OEMs) and Tier 1 | 2 Companies¹. South

¹ Tier 1 - Tier one companies are direct suppliers to OEMs

African products form part of global Supply Chains of well-known organisations such as Airbus and Boeing.

The dti and the local Commercial Aerospace Industry are of the understanding that the principal opportunities are likely to continue to be in the export market and mainly to supply components and sub-systems at different tiers into the Supply Chains of Boeing, Airbus, Bombardier, Embraer and in time other players from other emerging counterparts like China and Russia.

The importance of this industry to South Africa's Economic and Industrial Development warrant the need for the execution of a more detailed Study (as outlined in this ToR).

The focus of this study is on the value chain of Commercial Aerospace Manufacturing including MRO, Research and Technology, initiatives such as CAV, Aerospace Industry Support Initiatives and Small African Regional Aircraft and other related sectors classified as "Spill-over Effects" such as Advanced Manufacturing with the aim of increasing the exports exponentially.

6. Objectives

The main goal of this study is to provide strategy guidelines as a blueprint to achieve the following objectives:

- Doubling of the sector's manufactured exports over a period of five years as well as the localisation of imports of components (including manufactured goods required for the Servicing and Overhauling of Airplanes);
- Growing Sector employment by approximately 60% in high-tech jobs from the current base; and
- Transformation of various aspects of the Sector including Black Ownership, Skills- and Supplier Development with particular emphasis on Black Industrialisation.

The above objectives should be based on but not limited to the following:

- a) A confirmation I validation of export opportunities upon which future export-related growth areas (Manufacturing, Localization I Import Substitution and Parts produced for MRO) can be based on planning in order to strengthen and expand their position in the global Supply Chain.
- b) A validated quantified outline of the socio-economic benefits of the Commercial
- c) Aerospace Manufacturing Sector.
- d) The development and advancement of the Commercial Aerospace Manufacturing Industry, and the deepening and strengthening of the linkages between this Sector and other Sectors of the South African economy.
- e) A broadening of the participation of SMMEs in general and particularly Black-owned Enterprises in the Sector and the identification of government interventions that will support this outcome.
- f) Strengthening the ability of local firms to be effectively integrated into local and global Supply Chains.

Tier 2- Tier two companies are the key suppliers to tier one suppliers, without supplying a product directly to OEM companies

- g) Integrate the Centurion Aerospace Village (CAV), Aerospace Industry Support Initiatives and the CSIR could be optimally deployed as part of the overall Framework;
- h) Establish knowledge and interaction-networks to foster Technology and Innovation with the local Industry Stakeholders and global OEMs and Tier 1 | 2 companies with emphasis on a cluster-based approach such as CAV and Cloud Computing;
- i) Development of a case-for-action for the inclusion of additional interventions and measures related specifically to the Advanced Manufacturing phenomenon and the feasibility of a Growth Bi-lateral in this Sector serving as a Proof-of-Concept for possible inclusion as part of future dti Industrial Policy Activities.
- j) Recommendations regarding Sector-specific Regulatory requirements (local and international) as key enablers and qualifiers for the growth of the Commercial Aerospace Manufacturing Sector.
- k) The provision of guidance to various stakeholders on what is required for the further development of the Sector and increasing its integration into the South African economy.
- l) Presentation of short- and Long-term (3 and over 3 years respectively) intervention options, which are within the mandate of the dti and other relevant Public Sector stakeholders to support future activities and plans of the local industry, in order to achieve improved export yields and inter alia Employment creation.

7. Scope of Work

The service provider is expected to execute the following scope of work:

- 7.1 Identify and describe the prevailing industry structure including customer base, key role players, stakeholders, potential investors, transformation and the number of:
 - a. Manufacturers;
 - b. Intermediate input suppliers (to the manufacturers);
 - c. Raw Material manufacturers and suppliers;
 - d. Exporters; and
 - e. Importers/distributors. (In each case, primary export-creating firms should be identified;
 - f. This information should be used to construct an Industry Value Chain).
- 7.2 Scope the manufacturing and MRO capabilities of the local aerospace industry, based on the technology levels and as defined above.
- 7.3 Quantify prevailing levels of employment, production capacity and capacity utilisation levels across the Commercial Aerospace Manufacturing Sector in South Africa;
- 7.4 Quantify and outline the socio-economic benefits of the Commercial Aerospace Manufacturing Sector;
- 7.5 Analyse recent investment trends in the Sector, including the role of foreign and local direct investments;
- 7.6 Construct a detailed value chain of the industry using the above information; create future-related scenarios;
- 7.7 Determine the value and trends of imports, exports and re-exports, and based on this estimate the share of local production in exports and the level of import penetration relative to domestic demand;

- 7.9 Assess the international competitiveness of local participants using tools such as the revealed competitiveness arising from an analysis of international trade; market share trends, profitability trends etc.;
- 7.10 Identify and quantify the manufacturing and Import Substitution capabilities of the local Commercial Aerospace Manufacturing Sector;
- 7.11 Identify opportunities in the global Commercial Aerospace/ Aircraft-producing Industry for South African firms to expand exports, and for import replacement of products/ components currently imported;
- 7.12 Description of the role of government and the dti in achieving the stated objectives in assisting local companies to export to the African market and ultimately to other continents;
- 7.13 With regards to exports, discuss the role and impact of various Stakeholders including Associations. It should be determined how these roles should change in support of greater Commercial Aerospace Manufacturing exports from South Africa;
- 7.14 Propose two or more international Benchmarking Partnership options to dynamically assess the competitiveness of the SA Commercial Aerospace Manufacturing Sector;
- 7.15 Identify and describe the barriers to entry faced by exporters when attempting to access foreign markets and identify the most appropriate entry points into international markets;
- 7.16 Based on the analysis of "upstream" and "downstream" linkages between Commercial Aerospace Manufacturers and other Sectors of the South African economy, identify those Sectors that may benefit the most from increased local and international sales by the Aerospace Manufacturing Sector;
- 7.17 Identify those high technology "upstream" Sectors that may be able to contribute to the enhanced competitiveness of the local Commercial Aerospace Manufacturing Sector, and those "downstream" Sectors that could enjoy technological upgrades from technology transfer from the local Aerospace Manufacturing Sector;
- 7.18 Determine the suitability of specific Technologies and components I sub-systems as part of a Sector Growth Roadmap- while also considering all enabling aspects such as, inter alia, the provision of Advanced Manufacturing Skills as a key enabler;
- 7.19 Define an optimal Operating- and Business Model for the CAV or similar regional Hubs, with specific emphasis being placed on the Value Proposition to be provided, the tangible link between the Industry and R&D I Academia related to the Hub, roll- out of Advanced Manufacturing Technologies, Skills Development as well as the roles involved in ensuring viable and strategic outcomes;
- 7.20 Assess the local and international regulatory environment for the Aerospace Sector and identify specific regulatory issues and constraints that impact on the growth and development of the local Commercial Aerospace Manufacturing Sector;
- 7.21 Assess priority export markets and opportunities in terms of the following aspects:
- a. The value of investments required in the Industry and its distribution;
 - b. The "cost to win";
 - c. The cultural, language and other skills required;
 - d. The "openness" of the existing Supply Chain and the roles, as well as degree of competitiveness of incumbents in the market;
 - e. Relevant tariff- and non-tariff barriers and cost to trade including transport;
 - f. The potential to utilise or modify offsets I NIPP to the benefit of the Industry;
 - g. The need for and relevance of protecting intellectual property and the costs of acquiring and safe-guarding such protection;
 - h. The extent of national support currently provided to incumbents- and the degree
 - i. to which this support is accessible and accessed;
 - j. The ability to access finance; and

- k. The benefits that the market offers in terms of:
 - i. Increases in production volumes;
 - ii. The duration and continuity offered by an ideal Industrial Development Programme;
 - iii. Programme;
 - iv. The ability to leverage off an ideal Industrial Development Programme to access other opportunities in the same and other markets;
 - v. The ability to access new customers both at OEM as well as Tier 112 Level;
 - vi. The ability and benefits of Advanced Manufacturing Best Practices established through an Ideal Industrial Development Programme in this Sector being transferred to other Manufacturing Sectors in South Africa; and
 - vii. The potential margins that can be earned by various parties in the Supply Chain and the impact that this has in ensuring sustainable growth.

- 7.22 Based on the preceding analysis, undertake a SWOT analysis of the local Industry that identifies all relevant strengths, weaknesses, opportunities and threats;
- 7.23 Based on inter alia the SWOT analysis, identify and describe possible government interventions that could assist in building on identified strengths, reducing weaknesses, limiting threats and exploiting opportunities. Quantify the cost of these interventions;
- 7.24 Based on the analysis performed, propose specific support options for the SA Aerospace Manufacturing Sector in line with the major key processes involved in the Product Life-cycle;
- 7.25 Based on inter alia the preceding analysis, develop recommendations that relate to an appropriate national policy towards the local Commercial Aerospace Manufacturing Industry;
- 7.26 Based on an analysis of Advanced Manufacturing Trends, Developments, Opportunities and Threats, develop recommendations that relate to an appropriate national policy or inclusion of these goals as part of a broader National Manufacturing Policy; and
- 7.27 Based on conclusions reached, propose which existing and additional Government Incentives could and should be deployed and/or customised in achieving the defined strategic Sector objectives including the advancement of Advanced Manufacturing

8. Deliverables

The appointed service provider will be expected to report on the progress per milestone in accordance with the stated scope of work.

- 8.1 The service provider is expected to make presentations on their project plans and methodology to the dti and the Steering Committee within two weeks of the appointment.
- 8.2 The appointed service provider will be expected to report to the progress per milestone to the dti and the appointed steering committee in accordance with the stated scope of work.
- 8.3 The service provider is expected to assess and describe SA capabilities through Industry and SWOT analyses in line with the South African localisation /Growth endeavours and Industrial aspirations defined under Industrial Policy Action Plan (IPAP) and National Development Plan (NDP).

- 8.4 Demonstrate understanding of the SA aerospace industry legislation, industrial strategies, support and sustainability imperatives impacting the aerospace Industry sector.
- 8.5 The service provider is expected to present a synthesized solution and set of recommendations for criteria and principles to be followed in growing, localizing, diversifying and transforming the Commercial Aerospace Manufacturing Sector.
- 8.6 The service provider is expected to provide a feasibility study of implementing an Industrial Policy Growth Plan or Bi-lateral Agreement; this should include an Economic Benefit and BBBEE impact Section.
- 8.7 Present a final draft framework to the Joint Aerospace Industry Forum.
- 8.8 Conduct at least two Industry feedback sessions (one in Gauteng and one in Cape Town) to present the final draft Framework to industry and other stakeholders.
- 8.9 The final presentation to the industry should at least incorporate the following elements:
- Presentation and evaluation of consolidated data;
 - Identification and discussion of priority programmes;
 - Identification and discussion of priority segments and/or Tier-driven opportunities, that offer opportunities for sales growth over the short-, medium- and long-terms;
 - Identification and description of trends and Best Practices related to local; and
 - international Government Support Initiatives for the Aerospace Manufacturing Sector; and
 - Formulation of insights and opinions related to the relevance of findings and recommendations to a broader Industry scope than the Aerospace Manufacturing Sector such as the Aerospace and Defence Industry.
- 8.10 The final report submission must include the following:
- Electronic (in word and PowerPoint) and hard copies of the reports. At the end of the project, two final reports must be presented to **the dti**.
 - A comprehensive industrial development strategy and a report to be available to the wider industry summarizing the key opportunities and presenting a consolidated data analysis as basis

9. Project Timelines

The appointed service provider(s) will be required to start immediately after signing the contract and the project must be completed within nine (09) months from the date of signing the service level agreement.

10. Technical Evaluation Criteria

10.1 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.

10.1.1 BIDDER'S UNDERSTANDING OF THE RFP REQUIREMENTS	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate its understanding of the RFP requirements and provide a summary of how its proposal would address these requirements.</p> <p>The bidder must provide an Executive Summary to this effect.</p>			
<p>Substantiate / Comments</p>			

10.1.2 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must have relevant experience in conducting research studies across various manufacturing sectors.</p> <p>The bidder must provide at least three (3) relevant contactable references of similar work done in the past 5 (five) years. Please refer to Table (a) of Annexure 5 of this document for the format in which the required information must be provided.</p>			
<p>Substantiate / Comments</p>			

10.1.3 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate an in- depth knowledge of domestic and/or global trends within the Aerospace and Defence industry.</p> <p>The bidder must provide two (02) relevant contactable references where the bidder conducted research studies or provided advisory services on Aerospace and Defence industry in the past 5 (five) years. Please refer to Table (b) of Annexure 5 of this document for the format in which the required information must be provided.</p>			
<p>Substantiate / Comments</p>			

10.1.4 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate relevant experience in the development of industry strategies.</p> <p>The bidder must provide at least two (02) relevant contactable references of work done in the past 5 (five) years. Please refer to Table (c) of Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

10.1.5 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 objectives and deliverables will be achieved. The proposal must outline, amongst other things, the following:</p> <ul style="list-style-type: none"> • Data collection methods, sources and tools • Data analysis 			
Substantiate / Comments			

10.1.6 QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>The bidder must have multi-disciplinary team with post graduate qualifications in engineering and/or any other relevant qualifications. The key personnel must have 5 years or more solid experience in the Aerospace industry or related field</p> <p>The key personnel must have the following experience:</p> <ul style="list-style-type: none"> ▪ Industry knowledge – experience in and knowledge of the South African Aerospace industry; global and local Aerospace industry value chains; industry support programmes, incentives and institutions. ▪ Technical competency- industrial policy analysis; strategic policy assessment; local and international policy benchmarking; value chain analysis; firm-level analysis; industrial development programmes, policies and mechanisms; industrial strategy formulation, trade and import tariffs and related instruments; and ▪ Project relevant skills – industrial and policy research; proven experience in delivering large scale industrial strategy projects; desktop and first-hand research; stakeholder facilitation and engagement; diagnostic assessment and analysis, project management. <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> ▪ The 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 (d) Annexure 5 of this document for the format in which the required information must be provided. ▪ CVs of the key personnel; and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. 			
Substantiate / Comments			

10.1.7 PROJECT PLAN	Comply	Partially Comply	Not Comply
<p>The bidder must provide a detailed project plan which includes deliverables and timeframes and must be able to commence immediately upon appointment.</p> <p>Note: The project must be completed within nine (9) months.</p>			
Substantiate / Comments			

10.1.8 SKILLS TRANSFER PLAN	Comply	Partially Comply	Not Comply
<p>The bidder must provide a skills transfer plan to accommodate a maximum of three (3) dti officials. The bidder is required to outline the skills transfer plan as part of this proposal.</p> <p>The plan must articulate how skills transfer will take place with the dti officials over the period of the project to build capacity in the dti.</p>			
Substantiate / Comments			

10.1.9 PRESENTATIONS

Shortlisted bidders will be invited for a presentation. The presentation must include but not limited to the following:

No	Presentations	Maximum points
1	The bidder or one (1) of the team members must demonstrate a thorough understanding of the landscape of the South African local manufacturing and aerospace Industry including fundamental and applied research, targeted Technology Developments; Manufacturing, maintenance and modification of Parts I Product Systems as well as the workings of Supply Chains.	2
2	The bidder or one (1) of the team members must demonstrate an in-depth knowledge and familiarity with global trends in the Aerospace Industry - with a focus on international activities related to the establishment of an Aerospace-related Manufacturing Supply Sector.	2
3	The bidder or one (1) of the team members must demonstrate knowledge of the Industrial Policy and the Industrial Policy Action Plans of the dti and related SA legislations and policies including but not limited to Aerospace, Manufacturing and Advanced Manufacturing.	1
4	The bidder or one (1) of the team members must demonstrate an understanding of dti Incentives, NIPP as well as BBBEE instruments and the possible application thereof in supporting sustainability of the aerospace industry and broader Manufacturing Sector.	1
5	The bidder or one (1) of the team members must demonstrate an in depth knowledge of the advanced manufacturing and other aspects related to Disruptive Technologies.	1
6	The bidder or one (1) of the team members must demonstrate in-depth understanding of Best Practice Skills Development in world-class Technical/ Artisan Training related specifically to South African conditions.	1
7	The bidder or one (1) of the team members must demonstrate in-depth understanding and practical experience of Clusters, Hubs or Economic Development Zones (EDZ).	2
8	The bidder or one (1) of the team members must demonstrate in-depth understanding and practical experience of Research and Development activities related to modern and potentially Disruptive Technologies as well as their	1

No	Presentations	Maximum points
	Industrialization and deployment in Industry.	
9	The bidder or one (1) of the team members must demonstrate in-depth understanding and practical experience of BBBEE Initiatives in other IPAP-related Sectors and their application in support of socio-economic objectives.	2
10	The bidder or one (1) of the team members must demonstrate in-depth understanding and experience related to Strategic- and Sector-specific Economic Evaluation with work already performed in the Aerospace Sector.	2
11	The bidder or one (1) of the team members must demonstrate experience related to the involvement and alignment of Local Government, Provincial and National Development Agencies.	1
12	The bidder or one (1) of the team members must demonstrate experience with and exposure to the South African Commercial aerospace Industry including Manufacturing in this Sector; this also includes an understanding of International Quality and Manufacturing processes I requirements.	2
13	The bidder or one (1) of the team members must provide evidence of having done similar work in the past; this related specifically to strategies that relate to Industry-, Sector- or growth advancement in the South African context.	2
14	<p>BIDDER'S PROPOSED METHODOLOGY: 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 objectives and deliverables will be achieved. The proposal must outline, amongst other things, the following:</p> <ul style="list-style-type: none"> • Data collection methods, sources and tools • Data analysis 	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.)
Inception Report				
Assess and describe SA capabilities through Industry and SWOT analyses in line with the South African localisation /Growth endeavours and Industrial aspirations defined under IPAP and NDP.				

Demonstrate understanding of the SA aerospace industry legislation, industrial strategies, support and sustainability imperatives impacting the aerospace Industry sector.				
Present a synthesized solution and set of recommendations for criteria and principles to be followed in growing, localizing, diversifying and transforming the Commercial Aerospace Manufacturing Sector.				
Provide a feasibility study of implementing an Industrial Policy Growth Plan or Bi-lateral Agreement; this should include an Economic Benefit and BBBEE impact Section.				
Present a final draft framework to the Joint Aerospace Industry Forum.				
Conduct at least two Industry feedback sessions (one in Gauteng and one in Cape Town) to present the final draft Framework to industry and other stakeholders.				
The final presentation to the industry.				

Final Report				
Skills transfer to three (3) dti officials.				
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. **T20/08/17**, the General Conditions, and all other Annexures to the RFP Document, we offer to provide proposal for the development of the commercial Aerospace industrial Strategy 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

REQUEST FOR PROPOSAL FOR DEVELOPMENT OF THE COMMERCIAL AEROSPACE
INDUSTRIAL STRATEGY

(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	
Fax Number	

If Individual Bidder:	
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 – Invitation to Bid

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes <input type="checkbox"/> No	
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
		NAME:			

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs& QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ANSWER PART B:3 BELOW]
SIGNATURE OF BIDDER	DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			
TOTAL NUMBER OF ITEMS OFFERED		TOTAL BID PRICE (ALL INCLUSIVE)	
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:		TECHNICAL INFORMATION MAY BE DIRECTED TO:	
DEPARTMENT/ PUBLIC ENTITY		CONTACT PERSON	
CONTACT PERSON		TELEPHONE NUMBER	
TELEPHONE NUMBER		FACSIMILE NUMBER	
FACSIMILE NUMBER		E-MAIL ADDRESS	
E-MAIL ADDRESS			

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 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 / **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 – Certificate of Independent Bid Determination

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

SBD 9

- 44 -
CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

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6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However,

communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Annexure 6 – 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 bidder's current and demonstrate an in- depth knowledge of domestic and/or global trends within the Aerospace and Defence industry. (please refer to par 10.1.3 of Section 2 of this RFP document):

Client' Name	Project description	Project Cost	Project period (Start and End Dates)	Description of service performed and extent of Bidder's responsibilities	Name, title and telephone contact of client

Table (c) Details of the bidder's current and relevant experience in the development of industry strategies (please refer to par 10.1.4 of Section 2 of this RFP document):

Client' Name	Project description	Project Cost	Project period (Start and End Dates)	Description of service performed and extent of Bidder's responsibilities	Name, title and telephone contact of client

Table (d) 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 8 – BEE Commitment Plan

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

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