



**T21/11/16**

**APPOINTMENT OF PANEL OF VALUERS  
FOR LAND, BUILDING PLANT,  
EQUIPMENT AND MACHINERY**

**BID CLOSING DATE: THURSDAY, 24  
NOVEMBER 2016 AT 12:00 NOON**

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**SECTION 1: GENERAL CONDITIONS OF BID**

## 1. Proprietary Information

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

## 2. Enquiries

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- 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><a href="mailto:mmanthudim@idc.co.za">mmanthudim@idc.co.za</a></u>

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 15 November 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](http://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

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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

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- 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, **T21/11/16: Appointment of Panel of Land and Building and Plant, Equipment and Machinery Valuers**. 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 Thursday, 24 November 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**

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- 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**

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

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

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

## **7. Supplier Development**

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

## 8. IDC's Rights

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- 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

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- 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

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- 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

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

## 12. Response Format (Returnable Schedules)

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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)
  - 12.2.3



### **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
- 12.4.3 Annexure 7 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

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Bids shall be evaluated in terms of the following process:

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

- Submission of a valid Tax Clearance Certificate as referenced 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
  - 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
  - Annexure 7: Service Level Agreement (SLA)

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

### 13.2 Phase 2: Technical/ Functionality Evaluation

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

#### 13.2.1 **Mandatory Functional/ Technical Requirements**

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

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

13.2.2 **Other Functional/ Technical Requirements Category 1 (Land and Building Valuers)**

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

**Criteria for Small and Medium Sized Entities**

<b>ELEMENT</b>	<b>WEIGHT</b>
Relevant Experience of the Bidder/Bidder's team	35%
Managing conflict of interest	20%
Skills Transfer	15%
System, Tools and Processes	15%
Value Proposition	15%
<b>TOTAL</b>	100%

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

**Large Sized Entities**

<b>ELEMENT</b>	<b>WEIGHT</b>
Relevant Experience of the Bidder	15%
The Bidder's Capacity of Resources	10%
Managing conflict of interest	10%
Availability and ability to mobilise resources	10%
Skills Transfer	20%
System, Tools and Processes	20%
Value Proposition	15%
<b>TOTAL</b>	100%

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

13.2.3 **Other Functional/ Technical Requirements Category 2 (Plant Equipment and Machinery Valuers)**

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

**Criteria for Small and Medium Sized Entities**

<b>ELEMENT</b>	<b>WEIGHT</b>
Relevant Experience of the Bidder/Bidder's team	20%
Registration with appropriate societies/Associates	20%
Qualification	15%
Managing conflict of interest	10%
System, Tools and Processes	15%
Value Proposition	10%
Skills Transfer	10%
<b>TOTAL</b>	100%

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

**Large Sized Entities**

<b>ELEMENT</b>	<b>WEIGHT</b>
Relevant Experience of the Bidder	15%
The Bidder's Capacity of Resources	10%
Managing conflict of interest	10%
Availability and ability to mobilise resources	15%
System, Tools and Processes	20%
Value Proposition	10%
Skills Transfer	20%
<b>TOTAL</b>	100%

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

**1.1 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:

<b>CRITERIA</b>	<b>POINTS</b>
B-BBEE	10

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

## **14. Promotion of Emerging Black owned Service Providers**

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

**SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION**

## **SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION**

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### **1. Special instructions to bidders**

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

### **2. Background Information**

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The Industrial Development Corporation of South Africa Limited (IDC) is actively involved in the financing of enterprises which are geographically spread across South Africa and the rest of Africa. In order to ensure that the IDC financing activities are adequately secured, the underlying physical assets taken / considered for security and/or shareholder’s contribution have to be accurately valued. The physical assets which are to be valued would generally be in industrial and commercial sectors but not limited to the following:

- Industrial e.g. warehouses, manufacturing or processing or treatment plants/factories etc.;
- Healthcare Facilities, e.g. specialised medical facilities, Medical equipment manufacturing plant, etc.;
- Specialised and customised assets e.g. Mines, quarries, etc.; and
- Agriculture e.g. dairy, abattoirs, winery, silos, cold storage, packing sheds, etc.

The IDC wishes to establish a panel of preferred service providers to be engaged on an ad hoc basis to render valuation services.

Bidders may choose to bid for one or both categories i.e. Land and Building valuation /or Plant, Equipment and Machinery (PEM) valuation. The bidder must indicate, in the table below, with a **cross (X)** the category the bidder is bidding for:

<b>SERVICE CATEGORIES</b>	<b>PLEASE CROSS (X)</b>
Land and building valuation	
Plant, Equipment and Machinery (PEM) valuation	

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

### 3. Specific objective of the tender

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

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

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

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

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

### 4. Scope of Work

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

#### 4.1 Category 1: Land and Building valuation

The appointed bidders should demonstrate ability to have independently determined the property values for the following purpose:

- Due diligence (Structured finance for bonds and exposure, authenticating shareholder contributions, etc.)
- Rental determination
- Balance sheet valuation requirements
- Land development valuations
- Replacement valuations
- Servitude valuations
- Historical valuations
- Building conditions assessment
- Expropriation valuations
- Acquisition and alienations of properties
- Assets and assets verifications

The physical assets which are to be valued would generally be in the following property sectors:

- Industrial buildings e.g. warehouses, manufacturing or processing plants/ factories etc.



- Healthcare Facilities, e.g. specialised medical facilities, Medical equipment manufacturing plant.
- Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges
- Specialised properties, e.g. mines and quarries,
- Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds Retail and shopping complexes
- Service stations

## **4.2 Category 2: Plant, Equipment and Machinery (PEM) valuation**

### **4.2.1 Valuation Methodology**

The bidder's attention is drawn to the following IDC's accepted and internationally recognized definitions of the following valuation methodologies for common understanding and application when undertaking IDC valuations. Depending on the IDC requirements in the determination of value, the IDC may require one or a combination of the following valuation approaches which are defined are below:

#### **a) Estimated New Replacement Cost (ENRC)**

The Estimated New Replacement Cost is defined as the cost, as at the date of valuation, of replacing the existing asset with similar characteristics, capabilities and/ or production capacities, inclusive of all reasonable professional fees and installation costs, where applicable. In replacing existing or similar assets we include for all costs of transport, taxes, duties, installation fees and all piping, wiring and other services, foundations, footings and finishes which are attributable to the asset.

The estimated cost of replacing the asset as if new, at prices applicable at the valuation date, inclusive off professional fees and installation costs, but exclusive of any finance charges or the cost of demolition or emergency charges.

#### **b) Depreciated Replacement Value (DRV)**

##### **i) Depreciated Replacement Value (Reducing Balance)**

The estimated cost of acquiring and installing a new asset or a modern substitute asset having the same productive capacity as that existing, but exclusive of finance charges, is determined. This is then depreciated according to age, obsolescence and condition to obtain the value.

This cost is only to assets being part of an operating concern and assumed adequate profitability; it does not necessarily represent the Open Market Value of the asset.

##### **ii) Depreciated Replacement Value (Straight Line)**

The estimated cost of replacing the asset as if new, at prices applicable at the variation date, inclusive of fees and installation costs but exclusive of any finance charges or demolition costs is first determined. Depreciated Replacement Cost is a monetary statement of the remaining life of the asset based on the current capital Costs.

**c) Open Market Value (OMV)**

**i) Open Market Value (In-situ)**

The amount that a buyer should pay for the assets as a whole, in situ, reflecting the fact that the machinery is already installed and commissioned. It is the price that should be paid for the assets in the event that the company is sold as a going concern. To determine this figure, we consider the cost of purchasing a substantially similar machine of a comparable condition, on the open market, then make allowance for transport, installation and commissioning costs.

**ii) Open Market Value (Break-up basis)**

We assume all assets are sold individually for removal from the premises at the expense of the buyer. This value will inform the seller of expected realisations assuming a break-up sale of the assets is to be conducted in an unrestricted manner. No allowance is made for the cost incurred in conducting the sales.

**d) Forced Sale Value (FSV)**

The Forced Sale Value is the price which might be achieved if the asset was offered for sale as an individual item by auction within a prescribed time period assuming any offer must be accepted.

**e) Residual Value**

The residual value is the expected value of the asset at the end of its useful, economic and financially viable lifespan. Generally this is the scrap value in weight of the asset.

**4.2.2 Approach to Valuation Method**

The following approach shall be adopted by the Valuers in valuing the assets. The specified assets which are to be valued shall be inspected by the Valuer. The Valuer shall take note of the critical data of each and every asset in detail such detail shall not be limited to the following:

- Assets location within the client's functional hierarchy and operational units,
- Asset's functional use,
- Manufacturer name and date of manufacture,
- Suppliers and agents names,
- Description of the physical assets, model number, serial number, capacity and other pertinent details, etc)
- Condition of the assets:
  - maintenance status;
  - record of any performance enhancement/ refurbishment;
  - physical, economic and technological obsolescence, etc
- Ownership details (encumbrances, lease, etc)
- Outstanding capital payments and finance charges for any material and high value assets which are subject to lease or hire purchase arrangements which are to be settled in the short term.
- Reconcile Fixed Asset Registers and Equipment Registers against the data physically captured.

## 5. Deliverables

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### Category 1: Land and building valuation

The appointed bidders should compile fully motivated valuation reports which shall include, but not be limited to, the following:

- a) Purpose of valuation
- b) Effective date of valuation
- c) Description/ Title deed information
- d) Locality and neighborhood
- e) Market Overview/ economic activities in the area
- f) Topography, soil conditions, flood lines and shape
- g) Access and egress
- h) Servitudes
- i) Town planning information, municipal valuation and date, rates and taxes status
- j) Accommodation, sizes of the facilities, functional efficiency, Condition, services
- k) Highest and best use of the property
- l) Valuation Methodology and motivation for the adopted and rejected methods
- m) Determination of value
- n) Certificate of value

### Category 2: Plant, Equipment and Machinery (PEM) valuation

The appointed bidder should compile fully motivated valuation report which shall include but not be limited to the following amongst others:

- a) Purpose of valuation
- b) Effective date of valuation
- c) Method of approach to valuation
- d) Process adopted in sourcing market input data for and calculating replacement values and market values
- e) Detailed breakdown of value calculations in soft copy
- f) Market Overview/ economic activities in the industry in relation to the material and high value assets
- g) Functional efficiency, assets condition, maintenance record
- h) Valuation Methodology and motivation for the adopted methods
- i) Determination of value and value conclusion
- j) Valuation certificate

## 6. Project Timelines

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

**7. SECTION 2(A) TECHNICAL EVALUATION CRITERIA FOR SMALL & MEDIUM SIZED ENTITIES CATEGORY 1 (LAND AND BUILDING VALUATION)**

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

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

**7.1 Mandatory Technical Requirements**

7.1.1 REGISTRATION WITH THE PROFESSIONAL BODY	Comply	Not Comply
<p>The bidder's principal valuer(s) must be registered with the South African Council for the Property Valuers Profession (SACPVP) as a Professional Valuer without any restrictions.</p> <p>The bidder must submit as part of this proposal a copy of the certificate(s) for the principal valuer(s) as proof of registration with SACPVP.</p>		
<b>Substantiate / Comments</b>		

7.1.2 QUALIFICATION	Comply	Not Comply
<p>The bidder's principal valuer(s) must have at least a National Diploma in Property valuation with a recognised institution.</p> <p>Bidder must submit, as part of this proposal, a copy of qualifications to confirm compliance with the above requirement.</p>		
<b>Substantiate / Comments</b>		

7.1.3 PROFESSIONAL INDEMNITY INSURANCE	Comply	Not Comply
<p>The bidder must commit to submitting adequate and valid Professional Indemnity Insurance upon confirmation of the applicable scope of works</p>		
<b>Substantiate / Comments</b>		

7.1.4 BIDDER'S WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENT WITH LARGE VALUATION COMPANIES	Comply	Not Comply
The IDC intends promoting the transformation of the valuation fraternity through inclusive development of small Black owned valuation companies. Successful bidders will be required from time to time to enter into a joint engagement with any valuation firm on the panel. Bidders are required to confirm their acceptance of this condition		
<b>Substantiate / Comments</b>		

## 7.2 Other Technical Requirements

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

7.2.1 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder/ or valuers in the current employ of the bidder must demonstrate relevant experience in carrying out valuation services in different types of properties and for different purposes. Please refer to <b>Table (a) of Annexure 5</b> of this document to show your experience in different types of properties.</p> <p>The bidder must also provide three (3) relevant contactable references of valuation services done in the past 5 (five) years. Please refer to <b>Table (b) of Annexure 5</b> of this document for the format in which the required information must be provided.</p> <p><b>Note:</b> The bidder must also complete <b>Table (d) of Annexure 5</b> to indicate the ability to carry out valuation assignment in different provinces.</p> <p>The bidder must also submit CVs of the resources/ valuers; and the CVs must clearly highlight qualifications and areas of experience/ competence.</p>			
<b>Substantiate / Comments</b>			

7.2.2 SYSTEMS, TOOLS AND PROCESSES TO DELIVER ON VALUATION ASSIGNMENTS	Comply	Partially Comply	Not Comply
Valuation companies are required to outline the systems, tools, equipment and processes at their disposal to deliver on valuation assignments.			
<b>Substantiate / Comments</b>			

7.2.3 VALUE PROPOSITION	Comply	Partially Comply	Not Comply
The bidder must indicate their value proposition to the IDC and indicate what sets them apart from other bidders.			
<b>Substantiate / Comments</b>			

7.2.4 MANAGING CONFLICT OF INTEREST	Comply	Partially Comply	Not Comply
The bidder must indicate how they manage conflict of interest to ensure impartial and independent advisory services/ valuations.  Bidder must indicate how this aspect is managed and what controls are in place to ensure effectiveness.			
<b>Substantiate / Comments</b>			

7.2.5 SKILLS TRANSFER TO REGISTERED CANDIDATE VALUERS FROM PREVIOUSLY DISADVANTAGED GROUPS	Comply	Partially Comply	Not Comply
The IDC intends promoting the transformation of the valuation fraternity through inclusive development of candidates valuers. Bidding entities are required to indicate their commitment to assist the IDC through this tender by indicating their plans to support this objective of the IDC.			
<b>Substantiate / Comments</b>			

**8. SECTION 2(B) TECHNICAL EVALUATION CRITERIA FOR LARGE ENTITIES CATEGORY 1 (LAND AND BUILDING VALUATION)**

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

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

**8.1 Mandatory Technical Requirements**

8.1.1 REGISTRATION WITH THE PROFESSIONAL BODY	Comply	Not Comply
<p>The bidder's principal valuer(s) must be registered with the South African Council for the Property Values Profession (SACPVP) as a Professional Valuer without any restrictions.</p> <p>The bidder must submit as part of this proposal a copy of the Certificate for the principal valuer (s) as proof of registration from SACPVP.</p>		
<b>Substantiate / Comments</b>		

8.1.2 QUALIFICATION	Comply	Not Comply
<p>The bidder's principal valuer must have at least a National Diploma in Property valuation with a recognised institution.</p> <p>Bidder must submit as part of this proposal a copy of qualifications to confirm the compliance for the above requirement.</p>		
<b>Substantiate / Comments</b>		

8.1.3 PROFESSIONAL INDEMNITY INSURANCE	Comply	Not Comply
<p>The bidder must commit to submitting adequate and valid Professional Indemnity Insurance upon confirmation of the applicable scope of works.</p>		
<b>Substantiate / Comments</b>		

<b>8.1.4 PROFESSIONAL INDEMNITY INSURANCE BASED ON THE CURRENT VALUATION ASSIGNMENT (S)</b>	<b>Comply</b>	<b>Not Comply</b>
The bidder must provide proof of valid Professional indemnity insurance based on the current valuation assignment (s).		
<b>Substantiate / Comments</b>		

<b>8.1.5 BIDDER'S WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENT WITH SMALL VALUATION COMPANIES</b>	<b>Comply</b>	<b>Not Comply</b>
The IDC intends promoting the transformation of the valuation fraternity through inclusive development of small Black owned valuation companies. Successful Bidders will be required from time to time to enter into a joint engagement with any valuation firms on the panel. Bidders are required to confirm their acceptance of this condition		
<b>Substantiate / Comments</b>		

## 8.2 Other Technical Requirements

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

<b>8.2.1 BIDDER'S EXPERIENCE</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidder must demonstrate relevant experience in carrying out valuation services in different types of properties and for different purposes. Please refer to <b>table (a) of annexure 5</b> of this document to show your experience in different types of properties.</p> <p>The bidder must also provide three (3) relevant contactable references of valuation services done in the past 5 (five) years. Please refer to <b>Table (b) of Annexure 5</b> of this document for the format in which the required information must be provided.</p> <p><b>Note:</b> The bidder must also complete <b>Table (d) of Annexure 5</b> to indicate the ability to carry out valuation assignment in different provinces.</p>			
<b>Substantiate / Comments</b>			



8.2.2 CAPACITY OF RESOURCES	Comply	Partially Comply	Not Comply
<p>The bidder must have in its current employ resources/ valuers that have experience.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>List of resources/ valuers in the current bidder's employ. Please refer to <b>Table (c) Annexure 6</b> of this document for the format in which the required information must be provided.</li> <li>CVs of the resources/ valuers; and the CVs must clearly highlight qualifications and areas of experience/ competence.</li> </ul>			
<b>Substantiate / Comments</b>			

8.2.3 SYSTEM, TOOLS AND PROCESSES TO DELIVER ON VALUATION ASSIGNMENTS	Comply	Partially Comply	Not Comply
<p>Valuation companies are required to outline the system, tools, equipment and processes at their disposal to deliver on valuation assignments</p>			
<b>Substantiate / Comments</b>			

8.2.4 AVAILABILITY AND ABILITY TO MOBILISE RESOURCES	Comply	Partially Comply	Not Comply
<p>The bidder must have the ability to commence with valuations assigned upon appointment. The bidder is required to outline in the ability to commence with valuation assignment and indicate the availability (numbers of days) to commence with valuation assignment upon appointment under stringent timelines.</p>			
<b>Substantiate / Comments</b>			

8.2.5 VALUE PROPOSITION	Comply	Partially Comply	Not Comply
<p>The bidder must indicate they value proposition to the IDC and indicate what sets them apart from other bidders.</p>			
<b>Substantiate / Comments</b>			

8.2.6 MANAGING CONFLICT OF INTEREST	Comply	Partially Comply	Not Comply
<p>The bidder must indicate how they manage conflict of interest to ensure impartial and independent advisory services.</p> <p>Bidder must indicate how this aspect is managed and what controls are in place to ensure effectiveness.</p>			
<b>Substantiate / Comments</b>			

8.2.7 SKILLS TRANSFER TO REGISTERED CANDIDATE VALUERS FROM PREVIOUSLY DISADVANTAGED GROUPS	Comply	Partially Comply	Not Comply
The IDC intends promoting the transformation of the valuation fraternity through inclusive development of candidates valuation companies. Bidding entities are required to indicate their commitment to assist the IDC through this tender by indicating their plans to support this objective of the IDC.			
<b>Substantiate / Comments</b>			

**9. SECTION 2(B) TECHNICAL EVALUATION CRITERIA FOR SMALL & MEDIUM SIZED ENTITIES CATEGORY 2 (PLANT, EQUIPMENT AND MACHINERY (PEM) VALUATION)**

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

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

**9.1 Mandatory Technical Requirements**

<b>9.1.1 PROFESSIONAL INDEMNITY INSURANCE</b>	<b>Comply</b>	<b>Not Comply</b>
The bidder must commit to submitting adequate and valid Professional Indemnity Insurance upon confirmation of the applicable scope of works		
<b>Substantiate / Comments</b>		

<b>9.1.2 BIDDER'S WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENT WITH LARGE VALUATION COMPANIES</b>	<b>Comply</b>	<b>Not Comply</b>
The IDC intends promoting the transformation of the valuation fraternity through inclusive development of small Black owned valuation. Successful Bidders will be required from time to time to enter into a joint engagement with any valuation firms on the panel. Bidders are required to confirm their acceptance of this condition		
<b>Substantiate / Comments</b>		

## 9.2 Other Technical Requirements

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

9.2.1 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder/ or valuers in the current employ of the bidder must demonstrate relevant experience in carrying out valuation services in different types of assets for different purposes. Please refer to <b>table (a) of annexure 5</b> of this document to show your experience in different types of plant, equipment and machinery.</p> <p>The bidder must also provide three (3) relevant contactable references of valuation services done in the past 5 (five) years. Please refer to <b>Table (b) of Annexure 5</b> of this document for the format in which the required information must be provided.</p> <p><b>Note:</b> The bidder must also complete <b>Table (d) of Annexure 5</b> to indicate the ability to carry out valuation assignment in different provinces.</p> <p>The bidder must also submit CVs of the resources/ valuers; and the CVs must clearly highlight qualifications and areas of experience/ competence.</p>			
<b>Substantiate / Comments</b>			

9.2.2 SYSTEM, TOOLS AND PROCESSES TO DELIVER ON VALUATION ASSIGNMENTS	Comply	Partially Comply	Not Comply
<p>Valuation companies are required to outline the system, tools, equipment and processes at their disposal to deliver on valuation assignments</p>			
<b>Substantiate / Comments</b>			

9.2.3 VALUE PROPOSITION	Comply	Partially Comply	Not Comply
<p>The bidder must indicate they value proposition to the IDC and indicate what sets them apart from other bidders.</p>			
<b>Substantiate / Comments</b>			

<b>9.2.4 REGISTRATION WITH APPROPRIATE SOCIETIES/ ASSOCIATES</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidder's key individual must be registered/affiliated with the appropriate Societies/ Associates such as Royal Institute of Chartered Surveyors (RICS), American Society of Appraisers (ASA), Engineering Council of South Africa (ECSA) and South African Council for Property Valuers Profession (SACPVP).</p> <p>The bidder must submit as part of this proposal proof of registration from the relevant appropriate Societies/ Associates to confirm compliance to the above requirement.</p>			
<b>Substantiate / Comments</b>			

<b>9.2.5 QUALIFICATION</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidder's principal valuer must have at least a National Diploma in Property valuation, process engineering or equivalent qualification with a recognised institution.</p> <p>Bidder must submit as part of this proposal a copy of qualifications to confirm the compliance for the above requirement.</p>			
<b>Substantiate / Comments</b>			

<b>9.2.6 SKILLS TRANSFER TO REGISTERED CANDIDATE VALUERS FROM PREVIOUSLY DISADVANTAGED GROUPS</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The IDC intends promoting the transformation of the valuation fraternity through inclusive development of candidates valuers. Bidding entities are required to indicate their commitment to assist the IDC through this tender by indicating their plans to support this objective of the IDC.</p>			
<b>Substantiate / Comments</b>			

<b>9.2.7 MANAGING CONFLICT OF INTEREST</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
<p>The bidder must indicate how they manage conflict of interest to ensure impartial and independent advisory services.</p> <p>Bidder must indicate how this aspect is managed and what controls are in place to ensure effectiveness.</p>			
<b>Substantiate / Comments</b>			

**10. SECTION 2(B) TECHNICAL EVALUATION CRITERIA FOR LARGE ENTITIES CATEGORY 2 (PLANT, EQUIPMENT AND MACHINERY (PEM) VALUATION)**

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

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

**10.1 Mandatory Technical Requirements**

<b>10.1.1 PROFESSIONAL INDEMNITY INSURANCE</b>	<b>Comply</b>	<b>Not Comply</b>
The bidder must commit to submitting adequate and valid Professional Indemnity Insurance upon confirmation of the applicable scope of works		
<b>Substantiate / Comments</b>		

<b>10.1.2 PROFESSIONAL INDEMNITY INSURANCE BASED ON THE CURRENT VALUATION ASSIGNMENT (S)</b>	<b>Comply</b>	<b>Not Comply</b>
The bidder must provide proof of valid Professional indemnity insurance based on the current valuation assignment (s).		
<b>Substantiate / Comments</b>		

<b>10.1.3 REGISTRATION WITH APPROPRIATE SOCIETIES/ ASSOCIATES</b>	<b>Comply</b>	<b>Not Comply</b>
<p>The bidder's key individual must be registered/affiliated with the appropriate Societies/ Associates such as Royal Institute of Chartered Surveyors (RICS), American Society of Appraisers (ASA), Engineering Council of South Africa (ECSA) and South African Council for Property Valuers Profession (SACPVP).</p> <p>The bidder must submit as part of this proposal proof of registration from the relevant appropriate Societies/ Associates to confirm compliance to the above requirement.</p>		
<b>Substantiate / Comments</b>		

<b>10.1.4 QUALIFICATION</b>	<b>Comply</b>	<b>Not Comply</b>
<p>The bidder's principal valuer must have at least a National Diploma in Property valuation, process engineering or equivalent qualification with a recognised institution.</p> <p>Bidder must submit as part of this proposal a copy of qualifications to confirm the compliance for the above requirement.</p>		
<b>Substantiate / Comments</b>		

<b>10.1.5 BIDDER'S WILLINGNESS TO ACCEPT JOINT ENGAGEMENT FOR INDIVIDUAL ASSIGNMENT WITH SMALL VALUATION COMPANIES</b>	<b>Comply</b>	<b>Not Comply</b>
<p>The IDC intends promoting the transformation of the valuation fraternity through inclusive development of small Black owned valuation companies. Successful Bidders will be required from time to time to enter into a joint engagement with any valuation firms on the panel. Bidders are required to confirm their acceptance of this condition</p>		
<b>Substantiate / Comments</b>		

## 10.2 Other Technical Requirements

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

10.2.1 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate relevant experience in carrying out valuation services in different types of asset and for different purposes. Please refer to <b>table (a) of annexure 5</b> of this document to show your experience in different types of plant, equipment and machinery.</p> <p>The bidder must also provide three (3) relevant contactable references of valuation services done in the past 5 (five) years. Please refer to <b>Table (b) of Annexure 5</b> of this document for the format in which the required information must be provided.</p> <p><b>Note:</b> The bidder must also complete <b>Table (d) of Annexure 5</b> to indicate the ability to carry out valuation assignment in different provinces.</p>			
<b>Substantiate / Comments</b>			

10.2.2 CAPACITY OF RESOURCES	Comply	Partially Comply	Not Comply
<p>The bidder must have in its current employ resources/ valuers that have experience.</p> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• List of resources/ valuers in the current bidder's employ. Please refer to <b>Table (c) Annexure 6</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the resources/ valuers; and the CVs must clearly highlight qualifications and areas of experience/ competence.</li> </ul>			
<b>Substantiate / Comments</b>			

10.2.3 SYSTEM, TOOLS AND PROCESSES TO DELIVER ON VALUATION ASSIGNMENTS	Comply	Partially Comply	Not Comply
<p>Valuation companies are required to outline the system, tools, equipment and processes at their disposal to deliver on valuation assignments</p>			
<b>Substantiate / Comments</b>			



<b>10.2.4 AVAILABILITY AND ABILITY TO MOBILISE RESOURCES</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
The bidder must have the ability to commence with valuations assigned upon appointment. The bidder is required to outline ability to commence with valuation assignment and indicate the availability (numbers of days) to commence with valuation assignment upon appointment.			
<b>Substantiate / Comments</b>			

<b>10.2.5 VALUE PROPOSITION</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
The bidder must indicate they value proposition to the IDC and indicate what sets them apart from other bidders.			
<b>Substantiate / Comments</b>			

<b>10.2.6 SKILLS TRANSFER TO REGISTERED CANDIDATE VALUERS FROM PREVIOUSLY DISADVANTAGED GROUPS</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
The IDC intends promoting the transformation of the valuation fraternity through inclusive development of candidates valuers. Bidding entities are required to indicate their commitment to assist the IDC through this tender by indicating their plans to support this objective of the IDC.			
<b>Substantiate / Comments</b>			

<b>10.2.7 MANAGING CONFLICT OF INTEREST</b>	<b>Comply</b>	<b>Partially Comply</b>	<b>Not Comply</b>
The bidder must manage conflict of interest to ensure impartial and independent advisory services.  Bidder must indicate how this aspect is managed and what controls are in place to ensure effectiveness.			
<b>Substantiate / Comments</b>			

## **SECTION 3: PRICE PROPOSAL**

## Pricing Schedule

The bidder must complete the Pricing Schedule below

The bidder must indicate their standard rates:

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

## **SECTION 4: ANNEXURES**

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

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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

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

### BIDDING STRUCTURE

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

### REQUIRED INFORMATION

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

<b>If Individual Bidder:</b>	
Email address	
Postal Address	
Physical Address	

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

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

## Annexure 2 - 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, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, click on the icon "Register for Bid Defaulters" or submit your written request for a hard copy of the Register to facsimile number +27123265445.</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
	If so, provide particulars:		
3.3	<p>Was the Bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>



Item	Question	Yes	No
	If so, provide particulars:		
3.4	Does the Bidder relate to any IDC employee or part of IDC current or past staff (employee) establishment?	Yes <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

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

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

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

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

2.1 Full Name of bidder or his or her representative: .....

2.2 Identity Number:.....

2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....

2.4 Company Registration Number: .....

2.5 Tax Reference Number: .....

2.6 VAT Registration Number: .....

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

<sup>1</sup>“State” means –

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

(b) any municipality or municipal entity;

(c) provincial legislature;

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

(e) Parliament.

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 4 – Shareholders and Directors Information

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[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
<b>Total Black Shareholding % as per the current and valid B-BBEE Certificate</b>				

**5.3 Directors**

<b>Name of the shareholder</b>	<b>ID Number</b>	<b>Race</b>	<b>Gender</b>

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

## Annexure 5 - Response Format for Section 2

### Bidder's Experience and the proposed Project Team

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

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

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

*[Note to the Bidder: The bidder must complete the information set out below in response to the requirements stated in Section 2 of this bid document. If the bidder requires more space than is provided below it must prepare a document in substantially the same format setting out all the information referred to below and return it with this Returnable Schedule 3.]*

The bidder must indicate with a tick their experience in property types (Category 1)

Table A

Property Types	Industrial buildings e.g. warehouses, manufacturing or processing plants/factories etc.	Healthcare Facilities, e.g. specialised medical facilities, Medical equipment manufacturing plant	Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges	Specialised properties, e.g. mines and quarries	Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds	Service stations
Purpose of Valuation Assignment						
Due diligence (Structured finance for bonds and exposure, etc.)						
Balance sheet valuation requirements						



<b>Property Types</b>	<b>Industrial buildings e.g. warehouses, manufacturing or processing plants/factories etc.</b>	<b>Healthcare Facilities, e.g. specialised medical facilities, Medical equipment manufacturing plant</b>	<b>Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges</b>	<b>Specialised properties, e.g. mines and quarries</b>	<b>Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds</b>	<b>Service stations</b>
<b>Purpose of Valuation Assignment</b>						
Land development valuations						
Servitude valuations						
Rental determination						
Replacement valuations						
Lease Valuations						
Historical valuations						
Building conditions assessment						
Expropriation valuations						
Acquisition and alienations of properties						
Assets and assets verifications						

**Table A Category 2**

<b>Bidder's/ Valuer's experience</b>	<b>Comply</b>
The bidder must demonstrate relevant experience in carrying out valuation on the following types of plant, equipment and machinery, amongst others:	
a) Manufacturing/ Processing Plants, etc.	
b) Healthcare and Pharmaceutical equipment.	
c) Automotive industry	
d) Mining	
e) Specialised industries, e.g. mines, quarries, fisheries, storage depots and aviation	
f) Agriculture, e.g. packhouses, farming equipment and implements, food process plants and storage facilities	
g) Green Industries and infrastructure e.g. wind tower and solar manufacturing plants	

**Table (b) Details of the bidder's current and past experience (please refer to Section 2 of this RFP document):**

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

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

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

**Table (d) Bidder's geographical work coverage:**

Bidders must indicate with a tick the province they can render the service in

<b>Bidder's geographical work coverage</b>	<b>Tick</b>
North West	
Gauteng	
Mpumalanga	
Northern Cape	
Western Cape	
Kwa-Zulu Natal	
Free State	
Limpopo	
Eastern Cape	

## **Annexure 6 – BEE Commitment Plan**

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

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

## Annexure 7 – Service Level Agreement (SLA)

Bidders must refer to annexure 7 attached as a separate document. The SLA must be downloaded, completed and submitted together with the returnable documents as mentioned in schedule one of the bid document.

1. SLA	Comply	Not Comply
<p>The bidder must confirm that they have read and understood the terms and conditions set out in the attached Service Level Agreement (<b>Annexure 7</b>) which terms and conditions the bidder accepts, in the event that the IDC awards contract to the bidder pursuant to this bid.</p> <p>The bidder must complete the missing information on the Service Level Agreement as indicated and will be required to sign off on the terms and conditions together with initialling each page of the terms and conditions.</p>		
<b>Substantiate / Comments</b>		