



T19/03/23

**REQUEST FOR PROPOSAL FOR
INTEGRATED
BRAND COMMUNICATION AGENCIES**

**BID CLOSING DATE:
11 APRIL 2023 AT 11:00 AM**

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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 Sindi Mveli</u>
Telephone Number:	<u>+27 11 269 3650</u>
Email address:	<u>SindiM@idc.co.za</u>

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 31 March 2023**.
- 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 Bid responses must be submitted in electronic format only and must be e-mailed to the dedicated e-mail address as provided herein.
- 4.2 Bid responses should be in generally acceptable / standard electronic file format/s (i.e. Microsoft suite of products or pdf) to enable access thereto by the IDC for purposes of evaluating responses received. Where documents are presented in a format which cannot be accessed by the IDC through generally acceptable formats, such bid response will be disqualified.
- 4.3 The closing date for the submission of bids is **11 April 2023** not later than **11:00 AM (before midday)**. No late bids will be considered. Bids must **only** be sent to tenders@idc.co.za. Bids sent to any other email address other than the one specified herein will be disqualified and will not be considered for evaluation. It is the bidder's responsibility to ensure that the bid is sent to the correct email address and that this is **received** by the IDC before the closing date and time in IDC's dedicated tender e-mail inbox / address (tenders@idc.co.za).

- 4.4** Bidders are advised to submit / send its bid responses at least 15 minutes before the 11:00AM deadline to avoid any Information Technology (IT) network congestions or technical challenges in this regard which may result in bid responses being received late. IDC's e-mail servers are configured to receive e-mails with sizes up to 50MB.
- 4.5** The IDC will not be held responsible for any of the following:
- 4.5.1 bid responses sent to the incorrect email address;
 - 4.5.2 bid responses being inaccessible due to non-standard electronic file formats being utilised to submit responses by bidders;
 - 4.5.3 any security breaches and unlawful interception of tender / bid responses by third parties outside the IDC's IT network domain;
 - 4.5.4 bid responses received late due to any IT network related congestions and/or technical challenges; and
 - 4.5.5 bid responses with file size limits greater than IDC's e-mail receipt capacity of 50MB.
- 4.6** Only responses received via the specified email address will be considered.
- 4.7** Where a complete bid response (Inclusive of all relevant Schedules) is **not received** by the IDC in its electronic email tender box (tenders@idc.co.za) by the closing date and time, such a bid response will be regarded as incomplete and late. Such late and / or incomplete bid will be disqualified. **It is the IDC's policy not to consider late bids for tender evaluation.**
- 4.8** Amended bids may be sent to the electronic tender box (tenders@idc.co.za) **marked** "Amendment to bid" and should be received by the IDC **before** the closing date and time of the bid.

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** Bidder's tax affairs with SARS must be in order (tax compliant status) and bidders must provide written confirmation to this effect as part of their tender response.

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 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. Enterprise and 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 condition, bid validity period, RFP specification, 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 02 of 2016/2017: 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.
- 8.7 The IDC reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).
- 8.8 The IDC reserves the right of final decision on the interpretation of its tender requirements and responses thereto.

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 this RFP 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 an original valid Tax Clearance Certificate and / or proof of application of such as endorsed by SARS on the closing date and time of the bid submission and / or failure to provide the IDC with its SARS issued Tax Verification PIN code giving access to the IDC to electronically verify tax compliance;
- 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 any of the **mandatory requirements** as stipulated in the RFP document;
- 10.1.6 bidders who fail to comply with FICA and POPIA requirements as listed herein.

11. Local Production and Local Content

The IDC promotes Local Production and Local 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 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 **dtic** in an effort to stimulate local production and content where relevant.

Bidders are required to assess their product and /or service offering against the designated sector lists as published by the Department of Trade and Industry (the **dti**) and to ensure full compliance with the minimum local content threshold, if relevant, before submitting its response to this tender. The **dtic's** latest list of designated sectors can be accessed on: <http://www.thedtic.gov.za/sectors-and-services-2/industrial-development/industrial-procurement/>. The IDC reserves the right to apply the most relevant specified local content minimum thresholds during the adjudication of this RFP. The inclusion of minimum local content thresholds is therefore included in this RFP by

reference to the relevant website listed herein, for products listed (where applicable). For Local Content requirements, it will be required that only locally produced or manufactured goods, with a stipulated minimum threshold for local content will be considered.

12. Returnable Schedules

Bidders shall submit their bid responses in accordance with the returnable schedules 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 Valid Tax Clearance Certificate(s) (TCC) and / or proof of application as endorsed by SARS and / or SARS issued tax verification pin code;

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 Response to Annexure 6: BEE Commitment Plan

12.3.9 Bidders must submit a B-BBEE verification certificate. For Exempted Micro Enterprises (EME) with an annual revenue of less than R10 million and Qualifying Small Enterprises (QSE) with an annual revenue of between R10 million and R50 million per annum, a sworn affidavit confirming the annual total revenue and level of black ownership may be submitted. 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 must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).

12.3.10 Annexure 7 of this RFP document (duly responded to)

12.3.11 Annexure 8 of this RFP document (duly completed and signed, **if applicable**);

12.3.12 Annexure 9 of this RFP document (duly completed and signed);

12.3.13 Statement of Financial Position of the Bidder: Latest Audited Financial Statements (where applicable in terms of the Company's Act) and/or independently reviewed financial statements and/or Cashflow Budget for new entities with no financial records.

12.3.14 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 as a separate file/document marked Schedule 4: Price Proposal*)

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 and also the Specific Conditions of Bid, 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 12.3.4 above
- BEE Status Certification as referenced in 12.3.11 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: Tax Compliance Requirements
 - Annexure 3: Bidder's Disclosure
 - Annexure 4: Shareholders' Information/ Group Structure
 - Annexure 5: Bidders Experience & Project Team
 - Annexure 6: BEE Commitment Plan
 - Annexure 7: Disclosure Statement
 - Annexure 8: Local Content Declaration (If Relevant)
 - Annexure 9: Privacy & Protection of Personal Information Act 4 of 2013 Requirements

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

13.2 Phase 2: Technical/ Functionality Evaluation

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

13.2.1 Other Functional/ Technical Requirements (Category One)

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

ELEMENT	WEIGHT
Bidder's relevant experience and portfolio	25
Qualifications, Experience and Skills of the key personnel	30
Bidder's proposed strategic approach and methodology	25
Presentation	20
TOTAL	100

Note: Bidders who score 56 points out of 80 points (70%) or more in total for the functional/technical requirements will be shortlisted for presentations.

All bids that fail to achieve the minimum overall qualifying score of 70% on functional/technical requirements including the presentations shall not be considered for further evaluation on Price and Specific Goals.

13.2.2 Functional/ Technical Requirements (Category Two)

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

ELEMENT	WEIGHT
Bidder's relevant experience and portfolio	25
Qualifications, Experience and Skills of the key personnel	30
Bidder's proposed strategic approach and methodology	25
Presentation	20
TOTAL	100

Note: Bidders who score 56 points out of 80 points (70%) or more in total for the functional/technical requirements will be shortlisted for presentations.

All bids that fail to achieve the minimum overall qualifying score of 70% on functional/technical requirements including the demonstrations shall not be considered for further evaluation on Price and Specific Goals.

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
Specific Goals ¹	20
TOTAL	100 points

¹Specific Goals for this tender and points that may be claimed are indicated per table below:

Specific Goals	POINTS
	(80/20 system)
Black ownership ²	10
30% Black women ownership	5
Any % of ownership by Black Designated Groups ³	2
Reconstruction Development Programme Objective: Promotion of SMMEs (Entities that are EME or QSE)	3
Total Points	20

²Black ownership: 100% black owned entities will score the full 10 points and between 51% - 99.99% black owned entities will score 4 points.

³ Black Designated Groups has the meaning assigned to it in the codes of good practice issued in terms of section 9(1) of the Broad-Based Black Economic Act as amended.

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 either a consolidated B-BBEE scorecard or each bidder of the partnership in their individual capacity to submit a BEE certificate or Sworn Affidavit in case of an EME or QSE which will be considered as part of the Specific Goals scoring listed in 13.3.

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

1. Special instructions to bidders

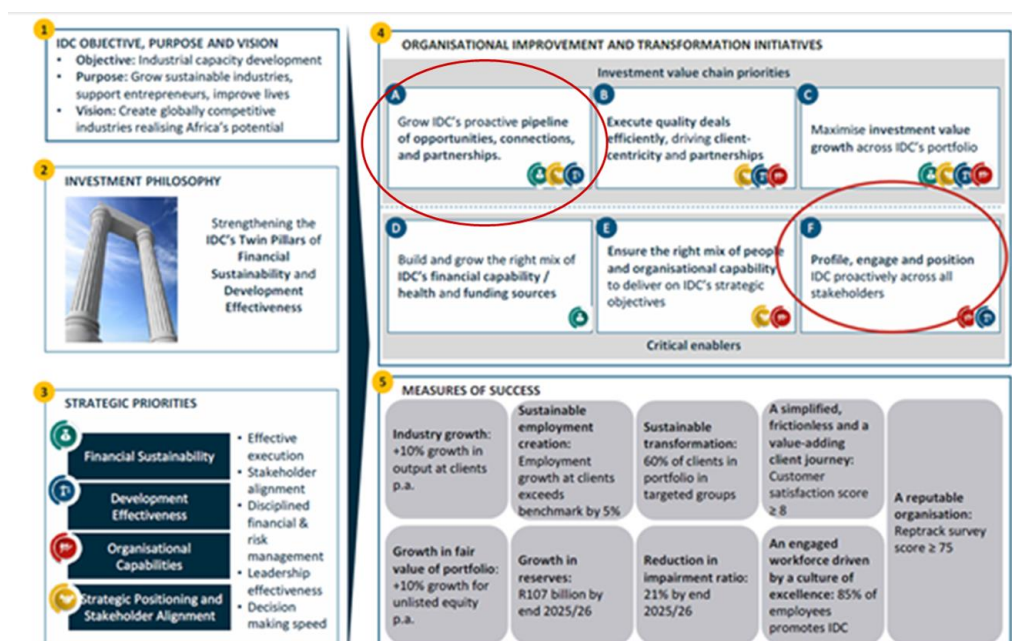
- 1.1 Should a bidder have reason to believe that the Functional Requirements are not open/fair and/or are written for a particular service provider; the bidder must notify IDC Procurement within five (5) days after publication of the RFP.
- 1.2 Bidders shall provide full and accurate answers to the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

2. Background Information

The Industrial Development Corporation (the IDC) is a self-financing, state-owned national development finance institution which provides financing to businesses (entrepreneurs) engaged in competitive industries and follows normal company policies and procedures in its operations.

The IDC is a multi-faceted corporation whose activities span across various sectors (10 sectors) of the economy.

Marketing’s role in executing the Corporate Plan (Strategy) is summarised within Theme F: Profile, engage and position the IDC proactively across all stakeholders, and theme A: Grow IDC’s proactive pipeline of opportunities, connections and partnerships.

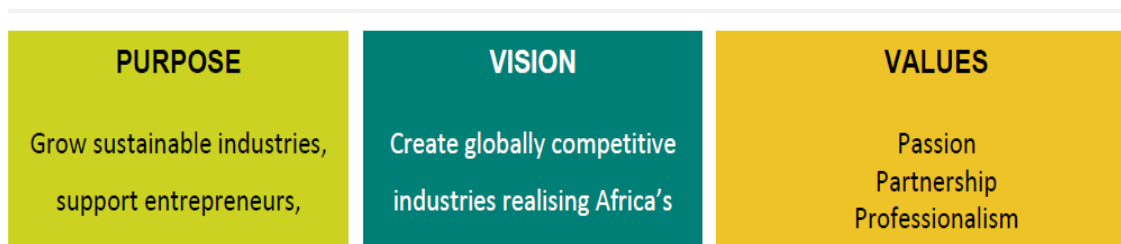


See FY22 Annual results / Integrated Report/ Press release

The jobs we create, the entrepreneurs whose ambitions are fueled through our funding, the value of our financial investments in society is phenomenal (funding approvals, CSI, ESD etc.). Our strategies and expertise have firmly secured us as a leader in the development finance space.

The role and mandate of the IDC can be described as: Growing the economy, creating a competitive enterprise sector, improving livelihoods remains our higher calling.

Our reason for existence being:



Our Customer Value Proposition (CVP) has recently been articulated as: The IDC proactively unlocks sustainable and inclusive industrial development and business growth, through the provision of tailored finance and partnering solutions based on an in-depth understanding of industry, resulting in value-creating relationships.

Our new slogan which replaces “Your partner in development finance” is: ***Partnering you. Growing the economy. Developing Africa.***

The CVP and its slogan are yet to formally be launched in the market

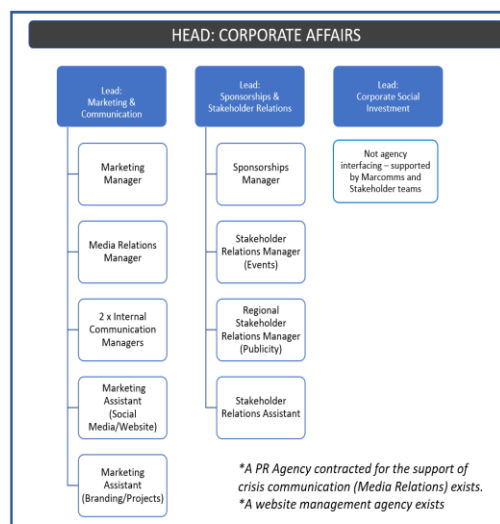
The marketing challenge can be summarised as:

- A need for an intentional marketing and differentiation strategy in the financial services space
- There exists a need to consolidate brand architecture as a branded house, where IDC remains the dominant (corporate) brand while the SBUs are the submissive brands (customer)
- Minimal benchmarking or indicators to measure ourselves against development financing landscape and traditional financial services exist (e.g. NPS, Brand Health, Awareness and Recall). We are currently guided by a bi-annual (every two years) Reputational Sentiment Tracker
- Corporate Identity created in 2010, needs a fresh brand persona and visual language (not logo redefining) to be embedded (photography, iconography, designed templates for internal and external use)
- Limited digital marketing tactics as the golden thread that ties internal and external marketing and communication activities and having the ability to keep the IDC brand “Always On” outside of big campaigns
- Owned social media channels sit outside of the Brandcomms agency panels, causing delayed social media integration of campaigns
- Community management on our social media pages is disjointed
- Minimal articulation of our excellent Employee Value Proposition.

The marketing opportunity therefore translates into:

- Develop compelling marketing and communication strategies, supported by executional plans that allow the strategic role of marketing to be delivered in market in a unique, compelling and tangible way (must result in pipeline), demonstrate our development mandate, while also establishing the IDC as a leading employer
- Create a strategic foundation that enables the clear articulation of the IDC brand, its purpose and personality, its development mandate and priority segments, along with the sectors within which it plays
- Develop Go-To-Market strategies that enable the leveraging of stakeholder and client engagement assets/programmes (Sponsorships; CSI programmes; Regional activations; Business Unit industry participation) in a way that reinforces a “One IDC” brand to the market
- Enhance our brand assets (visual language, not logo redefining) to guide consistency in how we show up
- Embrace and build strong digital marketing capabilities to ensure affordable “Always On” market presence and conversations with our core audiences
- Integrate community management of social media channels
- Establish a partnership with brand communication agencies to continuously drive our strategic marketing mandate while anchoring the brand architecture and its consistent communication.

The current structure of the Corporate Affairs department is illustrated below and provides an indication of day-to-day stakeholders the agencies can expect to engage with. The Marketing and Communication department forms 90% of the agency engagements:



Thus, the need exists for an Integrated Brand Marketing and Communication Agency, to drive the IDC marketing and communication strategy along with delivering a consistent brand narrative and engagement levers. This Lead Strategic Agency (**Category One**) will drive the co-creation of annual marketing communication strategies with the IDC Marketing and Communication team, and work in close collaboration with the IDC’s media agencies to develop campaigns, informed by consistency of insights and single-minded business objectives.

This agency would be the anchor service provider, providing Through-The-Line marketing including social media management of our owned channels (campaign and community management), along with communication support for the IDC. The agency must have the skills and capacity to deliver strategic counsel and expert execution across all disciplines, while maintaining a high-quality level of day-to-day service in normally very tight timelines.

24 Hour service and proactive community management of our social media channels is mandatory.

The Lead Strategic Agency (Category One) must demonstrate the ability to lead the integration of all Integrated Brand Marketing and Comms agencies' (including Website Management and the Engagement agency's efforts, PR and Media to a point)input in delivering a "One IDC brand" – in the form of quarterly Brand Council Sessions/Reviews as an example. This includes directing the usage and ensuring consistency of the IDC brand guidelines by all associated business partners and internal teams.

A second partner, the Support Agency (Category Two) will be appointed to fulfil the function of providing integrated brand communication, excluding the development of the annual IDC Marketing and Communication annual strategies (this will be fulfilled by the Lead Strategic Agency i.e. Category One). Strategic work may be required at a project / Business Unit level. The agency must have the skills and capacity to deliver exceptional and timeous execution across all disciplines, while maintaining a high-quality level of day-to-day service on regular and ad-hoc tactical events, activations, production work.

Bidders must indicate, in the table below, with a cross (X) the category the bidder is bidding for. Bidders can only participate in one category.

SERVICE CATEGORY	TYPE OF SERVICE	PLEASE MARK (X)
Category One	Lead Strategic Agency (Integrated Brand Marketing and Communication)	
Category Two	Support Agency (Integrated Brand Marketing and Communication)	

3. Scope of work/Terms of reference (Category One)

CATEGORY ONE: LEAD STRATEGIC AGENCY (INTEGRATED BRAND MARKETING AND COMMUNICATION)

The Industrial Development Corporation (IDC) seeks to appoint **one (1) service provider** to serve as the strategic lead on the Corporation's brand marketing and communication efforts. This will entail the end-to-end development of marketing strategy, research, planning to implementation through the development of campaigns through-the-line, including digital.

The appointed service provider will be required to provide the following services:

- Drive the development of strategic marketing and brand campaigns to support both the 'Corporate' brand and the Strategic Business Units (SBUs) in our key operating sectors - this includes ad-hoc research, insights gathering to inform comms. solutions and market immersions;

- Translate SBU marketing plans into Through-The-Line (TTL) brand activity in the market
- Entrench the Corporation's new Customer Value Proposition through compelling, industry specific marketing and communication;
- Introduce creative strategies to narrate the IDC's unique development mandate and define unique communication to highlight our priority segments: Black Industrialists, Women and Youth;
- Conceptualise engaging communication and platforms that demonstrate our heart for communities through CSI (purpose marketing);
- Support Stakeholder Management, Sponsorship and Events with creative and communication strategies that are audience intuitive and builds strong engagement that is measurable;
- Create great internal marketing solutions to drive the Employee Value Proposition which make IDCians (employees) brand advocates who passionately drive the corporate strategy;
- End-to-end development and management of the creative process
 - Creative strategy, creative conceptualisation, copy, layout and finished artwork for internal and external campaigns
 - quality checking, quality assurance and proofreading services on all work
 - Production management services (Through-The-Line);
- Strong digital creative services and understanding to help scale the digital presence and create "Always On" brand engagement;
- Digital Marketing services will include the management of the Corporation's social media pages (develop content plans, content creation, look and feel, online brand personality and day-to-day community management);
- Exceptional writing services to cater for the varied stakeholder and audiences that the IDC caters for;
- A national footprint (whether it be branches or networks) and resources to do brand activations and provide installation services of artwork/ material at IDC premises (head office and regional offices in South Africa) as and when required; and
- Provide multi-media services and brand activations as and when required to support business needs' at the IDC head office and regional offices in South Africa. These capabilities should encompass:
 - Promotions, roadshows, stakeholder presentations and events management
 - Brand PR
 - Exhibitions and trade shows
 - Branding (signage)
 - Promotional materials including merchandise, corporate gifting

4. Scope of Work/Terms of reference (Category Two)

The Industrial Development Corporation (IDC) seeks to appoint **one (1) service provider** to support and serve the Corporation's brand marketing and communication efforts, as a Support Agency to the lead strategic agency (Category One).

This role will entail the end-to-end development of tactical through-the-line (including digital) campaigns, brand activations and supporting any ad-hoc marketing/communications needs as they arise.

The appointed service provider will be required to provide, the following services:

- Support SBU marketing activity including regional activations;
- Develop creative communication aligned to business objectives and target segments/stakeholders;
- Develop engaging communication and create platforms that demonstrate our heart for communities through CSI (purpose marketing);
- Support Stakeholder Management, Sponsorship and Events with experiential touchpoints that deliver strong engagement that is measurable;
- End-to-end development and management of the creative process
 - Creative strategy, creative conceptualisation, copy, layout and finished artwork for internal and external campaigns - Quality checking, quality assurance and proofreading services on all work
 - Production management services (Through-The-Line);
- Exceptional writing services to cater for the varied stakeholder and audiences that the IDC caters for;
- A national footprint (whether it be branches or networks) and resources to do brand activations and provide installation services of artwork/ material at IDC premises (head office and regional offices in South Africa) as and when required; and
- Provide multi-media services and brand activations as and when required to support business needs' at the IDC head office and regional offices in South Africa. These capabilities should encompass:
 - Promotions, roadshows, stakeholder presentations and events management
 - Brand PR
 - Exhibitions and trade shows
 - Branding (signage)
 - Promotional materials including merchandise, corporate gifting

5. Project timelines

The appointed service providers will be required to start immediately after signing the contract and provide the services for a period of three (3) years, subject to annual review of service provider's performance.

6. Technical evaluation criteria (Category One)

6.1 Other Technical Requirements

The service provider must indicate their compliance/ non-compliance to the following requirements and to substantiate as required. The bidder must respond in the format below, where additional information is provided/ attached somewhere else; such information must be clearly referenced.

6.1.1. BIDDER'S EXPERIENCE AND PORTFOLIO	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate its relevant experience in providing integrated brand marketing and communication services (including strategy formulation) for clients.</p> <p>The bidder must provide three (3) relevant contactable references of similar work done in the past 5 (five) years. The composition of the three (3) references must be as follows:</p> <ul style="list-style-type: none"> • One reference must be in financial services • One reference must be in the public sector (e.g. Government departments or SOEs) • One reference can be for any sector <p>Please refer to Table (a) of Annexure 5 of this document for the format in which the required information must be provided.</p> <p>Note: IDC reserves the right to contact the references supplied by the bidder.</p>			
Substantiate / Comments			

6.1.2. QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>The bidder must provide an organogram of the team members that will be servicing the IDC account. The team must include, but not limited to, the following: Strategist, Creative team: (Creative Director, Art Director/Graphic Designer, Copywriter), Content/Communication Specialist, Digital Marketing Team: (Digital Marketing Specialist, Social and Community Manager), Account Manager, Production Manager.</p> <p>The bidder must include CVs of all team members to be servicing the IDC account and specify the areas of specialty, client portfolio experience and clearly demonstrate reporting lines within the organisation (structure).</p> <p>The management of our owned digital channels requires a strong and dedicated Digital Marketing team, in order to fulfil the campaigning, day-to-day community management and also the digital performance role efficiently.</p> <p>Please refer to Table (b) of Annexure 5 of this document for the format in which the organogram required should be provided.</p> <p>The bidder must state the total number of resources to be allocated to the IDC account (personnel), and available to service projects.</p>			

6.1.2. QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>The IDC takes express interest in the management or team leader roles within the bidder's organisation, as such, please ensure a detailed outline of the following roles:</p> <p>a) STRATEGIST (Proposed lead for the IDC Account) The bidder must have a lead marketing/brand strategist with at least ten (10) years' experience in developing marketing and communications strategies, and experience within the financial services sector must have been in the last five (5) years. Consumer/services brand in the last five (5) years, with public sector roles in the last five (5) years being an added advantage.</p> <p>The provided CV by the bidder must specify and demonstrate the strategist' working experience where they serviced financial, public and services sector clients (the Strategist must have been a permanent or freelance employee for a minimum period of one year at each referenced organisation). The CV must also specify the associated years in servicing the listed clients.</p>			
<p>b) CREATIVE DIRECTOR</p> <p>The bidder must have a Creative Director/Manager with at least ten (10) years' experience in developing campaigns that have produced tangible success for clients and needs to demonstrate these results in their profile (in-market launches /brand projects/ consumer change/industry recognition/ awards by industry bodies/ replication of concept across markets etc.)</p> <p>The bidder must provide a detailed CV specifying the lead Creative Director/Manager's working experience and notable career successes.</p> <p>The CV must also specify the clients serviced, with associated years in servicing those clients. A financial services sector reference must be within the last five (5) years. (The Creative Director must have been a permanent or freelance employee for a minimum period of one year at each referenced employer).</p> <p>The bidder must provide full names and designation of the creative team reporting into this role.</p>			
<p>c) ART DIRECTOR/GRAPHIC DESIGNER AND A COPYWRITER</p> <p>The bidder must have a complementary duo of design and writing capabilities. These two (2) roles will work together daily on the various briefs in order to ensure synergy between content and visual style.</p> <p>The Art Director/Graphic Designer plus the Copywriter designated to the account to have no less than five (5) years' experience in the design and writing against multi-sectoral marketing and communication briefs.</p> <p>The bidder must provide detailed CVs specifying their working experience and notable career successes in the creative domain.</p>			

6.1.2. QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>d) COMMUNICATION/CONTENT SPECIALIST</p> <p>The bidder must have communication resources including writing capabilities spanning technical financial communication and reports; internal communication; writing for the media (journalism); creative content creation for campaigns; writing for digital.</p> <p>The Communication Specialist designated to the account to have no less than (10) years' experience in providing writing services across multiple channels.</p> <p>The bidder must provide a detailed CV specifying the lead Communication/Content Specialist' working experience and notable career successes.</p> <p>The CV must also specify the clients serviced, with associated years in servicing those clients. A financial services sector reference must be within the last five (5) years.</p> <p>The bidder is to provide samples of financial communication written by this role (brochures/industry reports/articles) to also be included with the CV.</p>			
<p>e) DIGITAL MARKETING SPECIALIST</p> <p>The bidder must have end-to-end digital marketing management resources, to manage daily campaigning and also performance monitoring.</p> <p>The Digital Marketing Specialist designated to the account must be senior, with no less than five (5) years' experience in providing digital first strategies and full execution across multiple platforms. Social media management experience is essential.</p> <p>The bidder must provide a detailed CV specifying the lead Digital Marketing Specialist' working experience, digital media tools trained and accredited in and notable career successes if any.</p> <p>The bidder must provide full names and designations of the members of this digital team working alongside this role if any.</p>			

6.1.2. QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>f) SOCIAL AND COMMUNITY MANAGER</p> <p>The bidder must have a knowledgeable resource in digital marketing with great copy writing skills, fingers on the pulse of social media platforms, trends and opportunities. Management of effective crisis management communication with agility is crucial.</p> <p>The Social and Community Manager designated to the account must be senior, with no less than five (5) years' experience in providing digital first strategies and full execution across multiple platforms including social media. With two (2) of those years being in community management. They must be independent and meticulous with closing conversations successfully and accurately on social channels in partnership with the IDC client. Unlocking proactive social ideas and business-centric solutions are a prerequisite.</p> <p>The bidder must provide a detailed CV specifying the lead Social and Community Manager's working experience, digital media tools trained and accredited in and notable career successes if any.</p> <p>The bidder must provide full names and designations of the members of this team working alongside this role if any, as it is not usually working in a silo.</p>			
Substantiate / Comments			

6.1.3. BIDDER'S APPROACH AND METHODOLOGY	Comply	Partially Comply	Not Comply
<p>a) The bidder will be required to lead and develop strategic marketing, brand and communication campaigns to support both the 'Corporate' brand and the Strategic Business Units (SBUs) in our key operating sectors.</p> <p>A demonstration of strategic models and frameworks used to develop plans is expected, along with the measurement and evaluation process applied to review such.</p>			
<p>b) The bidder must indicate what internal structure, systems and processes they have in place to support the IDC's Corporate Affairs team as per the organogram outlined.</p> <p>With the above organogram in mind, the bidder must provide a proposed way of work (model) to guide the governance, interactions and relationship as the leading brand communication agency (both with the IDC team and with other agencies in existence who provide complimentary services). In essence, how will you manage operations (agency and client side) as lead agency to ensure a seamless partnership and that the IDC work is prioritised at all times?</p>			
<p>c) The bidder must demonstrate their strategy and creative development approach for both internal and external campaigns by providing a sample of previous work done for each of the following three (3) categories:</p> <ul style="list-style-type: none"> • A marketing campaign with a clear call to action linked to the business's strategic objectives, and demonstrate that it is an integrated, 360-degree campaign. <ul style="list-style-type: none"> - This must include an employee engagement element - Must cover one of the preferred sectors listed above (financial/public) • A purpose-led communication campaign (external) with a clear call to action (demonstrate understanding of development sector/the role of CSI) <ul style="list-style-type: none"> - Can cover any of the preferred sectors listed above (financial/public/services) • Stakeholder communication and report development (e.g. Integrated Report, Segment/Industry studies, Business roadshow presentations) <ul style="list-style-type: none"> - This to showcase the writing, conceptual development, design and production of formal and technical communication 			

6.1.3. BIDDER'S APPROACH AND METHODOLOGY	Comply	Partially Comply	Not Comply
<p>d) The bidder will be required to execute brand activation activities by providing one example each of the following: (must have launched not conceptual)</p> <ul style="list-style-type: none"> • Events specific campaign, covering the brief, creative solution including messaging, and the experiential application • One Corporate Identity development project (designed by agency), including strategic rationale and applied to collateral <ul style="list-style-type: none"> - stationery - clothing - gifting - office signage where applicable 			
<p>e) The bidder must demonstrate their Production Management process flow and capabilities, by providing a framework for managing production work i.e. Above -The-Line (ATL) productions. For the benefit of this proposal, please use a TV production scenario.</p> <p>f) To ensure that production can be done on short notice and to obtain competitive rates for IDC jobs,</p> <p>The bidder must provide two (2) contactable references for each of the following disciplines:</p> <ul style="list-style-type: none"> • Printing companies • Production companies (produce TV/radio/Digital or multi-media content) • Branded collateral/ merchandise suppliers (keeping our mandate to source and produce local content in mind) <p>Note – the IDC reserves the right to request signed agreements of stated suppliers.</p>			
Substantiate / Comments			

6.1.4. Presentations

Shortlisted bidders will be required to provide a presentation to the IDC technical evaluation team.

The presentation must cover but not limited to the following:

Presentations	Maximum points
a) Introduction: Organogram of the team proposed to work on the IDC account and profiles	2
b) Description of the two (2) case studies/ scenario – campaign including rationale.	5
c) Approach followed to develop the strategy to support the objectives.	5
d) Execution of the strategy including creative development and campaign tactics.	5
e) Success factors and how the success rate was measured	3

Note: The presentation must be facilitated by the team that will be servicing the IDC account on a full-time basis. The team presented are to remain on the IDC account for no less than one (1) year for consistency of service. Should the employee leave the employer, or need to be re-assigned, the agency is mandated to replace the resource with an equivalent or higher skilled individual.

7. Technical evaluation criteria (Category Two)

7.1 Technical Requirements

The service provider must indicate their compliance/ non-compliance to the following requirements and to substantiate as required. The bidder must respond in the format below, where additional information is provided/ attached somewhere else; such information must be clearly referenced.

7.1.1. BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate its relevant experience in providing integrated brand communication services to corporate clients.</p> <p>The bidder must provide three (3) relevant contactable references of similar work done in the past 5 (five) years.</p> <ul style="list-style-type: none"> - One reference must be in financial services - One reference must be in the public sector - One reference must be in the services sector <p>Please refer to Table (d) of Annexure 5 of this document for the format in which the required information must be provided.</p> <p>Note: IDC reserves the right to contact the references supplied by the bidder</p>			
Substantiate / Comments			

7.1.2. QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>The bidder must provide an organogram of the team members that will be servicing the IDC account. The team should include but not limited to the following; Strategist, Creative /Art Director, Graphic Designer, Communication Specialist (writing/campaign development), Key Account Manager, Production Specialist.</p> <p>The bidder must include CVs of all team members to be servicing the IDC account.</p> <p>The bidder must state the total number of fixed day-to-day resources to be allocated to the IDC account (personnel), and available to service projects.</p> <p>Please refer to Table (e) of Annexure 5 of this document for the format in which the organogram required should be provided.</p> <p>The bidder must state the total number of resources to be allocated to the IDC account (personnel), and available to service projects.</p>			

7.1.2. QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<p>a) BRAND STRATEGIST (TEAM LEADER)</p> <p>The bidder must have a lead marketing/brand strategist with at least five (5) years' experience in developing marketing and communications strategies, with experience in the financial services sector being in the last three (3) years. Public Sector and Services categories are recommended as key experience for at least two (2) years.</p> <p>The detailed CV must specify the strategist' working experience where they serviced financial sector clients (the strategist must have been a permanent or freelance employee). The CV must also specify the associated years in servicing those clients.</p>			
<p>b) CREATIVE DIRECTOR</p> <p>The bidder must have a Creative/Art Director with at least five (5) years' experience in developing campaigns that have produced tangible success for clients (in-market launches /sales/re-branding of an entity/consumer behaviour etc.)</p> <p>The bidder must provide a detailed CV specifying the lead creative team's working experience. The CV must also specify the clients serviced, with associated years in servicing those clients.</p>			
<p>c) ART DIRECTOR/GRAPHIC DESIGNER AND A COPYWRITER</p> <p>The bidder must have a complementary duo of design and writing capabilities. These two (2) roles will work together daily on the various briefs in order to ensure synergy between content and visual style.</p> <p>The Art Director/Graphic Designer plus the Copywriter designated to the account to have no less than five (5) years' experience in the design and writing against multi-sectoral marketing and communication briefs.</p> <p>The bidder must provide detailed CVs specifying their working experience and notable career successes in the creative domain.</p>			
<p>d) COMMUNICATION SPECIALIST</p> <p>The bidder must have communication resources including writing capabilities spanning technical financial communication and reports; internal communication; writing for the media (journalism); creative content creation for campaigns; writing for digital.</p> <p>The Communication Specialist designated to the account to have no less than (5) years' experience in providing writing services across multiple channels.</p> <p>The bidder must provide a detailed CV specifying the lead Communication/Content Specialist' working experience and notable career successes.</p> <p>The CV must also specify the clients serviced, with associated years in servicing those clients.</p>			
Substantiate / Comments			

7.1.3. BIDDER'S APPROACH AND METHODOLOGY	Comply	Partially Comply	Not Comply
<p>The bidder is to demonstrate the approach to end-to-end campaign development process and tools used in responding to a marketing/comms. brief.</p> <p>a) The bidder must indicate what internal structure, systems and processes they have in place to support the IDC's Corporate Affairs team.</p> <p>The bidder must provide one example each of the following:</p> <ul style="list-style-type: none"> • A marketing campaign with a clear call to action linked to the business's strategic objectives, and demonstrate that it is an integrated, 360-degree campaign. <ul style="list-style-type: none"> - This must include an employee engagement element - Must cover one of the preferred sectors listed above (financial/public) • A purpose-led communication campaign with a clear call to action (demonstrate understanding of development sector/the role of CSI) • Stakeholder communication and report development (e.g. Integrated Report, Segment/Industry studies, Business roadshow presentations) <ul style="list-style-type: none"> - This to showcase the writing, conceptual development, design and production of formal and technical communication. 			
<p>b) The bidder will be required to execute brand activation activities by providing one example each of the following: (must have launched not conceptual)</p> <ul style="list-style-type: none"> • Events specific campaign, covering the brief , creative solution including messaging, and the experiential application • One Corporate Identity development project (designed by agency) applied to collateral <ul style="list-style-type: none"> - stationery - clothing - gifting - office signage where applicable 			

7.1.3. BIDDER'S APPROACH AND METHODOLOGY	Comply	Partially Comply	Not Comply
<p>c) The bidder must demonstrate their Production Management process flow and capabilities, by providing a framework for managing collateral production work i.e. Below -The-Line (BTL) productions. For the benefit of this proposal, please use a corporate brochure production scenario.</p> <p>d) To ensure that production can be done on short notice and to obtain competitive rates for IDC jobs, the bidder must provide two (2) contactable references for the following disciplines:</p> <ul style="list-style-type: none"> • Printing companies • Production company (produce TV/radio/Digital or multi-media content) • Branded collateral/ merchandise suppliers (keeping our mandate to produce local content in mind) <p>Please refer to Table (f) of Annexure 5 of this document for the format in which the required information should be provided.</p> <p>Note – the IDC reserves the right to request signed agreements of stated suppliers.</p>			
Substantiate / Comments			

7.1.4. Presentations

Shortlisted bidders will be required to provide a presentation to the IDC technical evaluation team.

The presentation must cover but not limited to the following:

Presentations	Maximum points
a) Introduction: Organogram of the team proposed to work on the IDC account and profiles	2
b) Description of the two (2) case studies/ scenario – campaign including rationale.	5
c) Approach followed to develop the strategy to support the objectives.	5
d) Execution of the strategy including creative development and campaign tactics.	5
e) Success factors and how the success rate was measured	3

Note: The presentation must be facilitated by the team that will be servicing the IDC account on a full-time basis. The team presented are to remain on the IDC account for no less than one (1) year for consistency of service. Should the employee leave the employer, or need to be re-assigned, the agency is mandated to replace the resource with an equivalent or higher skilled individual.

SECTION 3: PRICE PROPOSAL

SECTION 3: Cost Proposal

1 **NOTE: All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR).**

2 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.

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

4

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>		

5

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

6

The IDC reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 02 of 2016/2017: 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		

7 COSTING MODEL (CATEGORY ONE)

7.1 Table A – Once-off Strategy and Campaign Development

The bidder is required to quote for a once-off brand strategy development and a launch campaign for the IDC, which serves as a base of the nature of work required of the Lead Integrated Brand Communication Agency.

Description	Total Cost Excl. VAT
Once-off Brand strategy development, inclusive of, but not limited to: - Brand dipstick research - Brand audit - Brand strategy inclusive of stakeholder and sector analysis - Corporate Identity review and refresh recommendations - Brand campaign proposal including sample go-to-market collateral (excludes media buying)	
Total Costs (VAT Excl.)	
VAT (15%)	
Total Costs (VAT Incl.)	

7.2 Table B: Social and Community Management Monthly Fee

Description	Monthly Cost (ex. VAT)	Annual Cost (ex. VAT)
Social and Community Management		
Year 1 Cost		
Year 2 Cost		
Year 3 Cost		
Total Costs over 3 years (VAT Excl.)		
VAT (15%)		
Total Costs over 3 years (VAT Incl.)		

7.3 Table C – Retainer Fee

The bidder is required to quote for a monthly retainer, covering the most essential and day-to-day resources expected to service the IDC account, based on the scope of work outlined in Section 2 above. It is imperative for the bidder to consider all roles required upfront, in order to avoid out-of-scope fees.

Description / Level of Resource	Number of Hours per month	Hourly Rates (ex. VAT)	Monthly Cost (ex. VAT)	Annual Cost (ex. VAT)
Campaign Strategy and Planning	40			
For TTL Creative Work	200			
Account Management	100			
Status Meetings	6			
Disbursements				
Retainer Year 1 Cost				
Retainer Year 2 Cost				
Retainer Year 3 Cost				
Total Costs over 3 years (VAT Excl.)				
VAT (15%)				
Total Costs over 3 years (VAT Incl.)				

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

Cost Element	Cost (VAT Excl.)
Sub-Total Disbursements	

Note on pricing:

Disbursements (incidental expenses other than professional fees e.g. travel and accommodation, printing costs, 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.

Total Bid Price (7.1 + 7.2 + 7.3) (VAT INCL.)	
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SUMMARY OF THE PROPOSAL CATEGORY ONE BIDDER ONLY

DESCRIPTION	BIDDER’S PROPOSAL
Number of resources (personnel)	
Once-off strategy and campaign development (Only applicable to CATEGORY ONE)	
Year 1 Retainer cost (VAT Excl.)	

8 COSTING MODEL (CATEGORY TWO)

8.1 Retainer Fee

Description / Level of Resource	Number of Hours per month	Hourly Rates (ex. VAT)	Monthly Cost (ex. VAT)	Annual Cost (ex. VAT)
Campaign Strategy and Planning	20			
For TTL Creative Work	100			
Account Management	40			
Status Meetings	2			
Disbursements				
Retainer Year 1 Cost				
Retainer Year 2 Cost				
Retainer Year 3 Cost				
Total Costs over 3 years (VAT Excl.)				
VAT (15%)				
Total Costs over 3 years (VAT Incl.)				

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

Cost Element	Cost (VAT Excl.)
Sub-Total Disbursements	

Note on pricing:

Disbursements (incidental expenses other than professional fees e.g. travel to the IDC offices, printing costs, 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.

SUMMARY OF THE PROPOSAL: CATEGORY TWO BIDDER ONLY

DESCRIPTION	BIDDER'S PROPOSAL
Number of resources (personnel)	
Year 1 Retainer cost (VAT Excl.)	

Price Declaration Form

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. **T19/03/23**, the General Conditions, and all other Annexures to the RFP Document, we offer to provide strategic lead services on the IDC’s brand marketing and communication efforts as specified in this RFP document.

R..... (Including VAT)

In words

R..... (Including 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 over and above this amount in connection with the provision of this service.

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

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

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

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF: COMPANY NAME

Tel No

Fax No

Cell No

SECTION 4: ANNEXURES

Annexure 1: Acceptance of Bid Conditions and Bidder's Details

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised Signatory _____

Position of Authorised Signatory _____

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

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

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

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

BIDDING STRUCTURE

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

REQUIRED INFORMATION

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

1. TAX COMPLIANCE REQUIREMENTS		
1.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.	
1.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.	
1.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.	
1.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.	
1.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.	
1.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.	
2. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS		
2.1	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.2	DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.3	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.4	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<p>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 1.3 ABOVE.</p>		
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	

Annexure 3: Bidder's Disclosure

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest ¹ in the enterprise,
employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 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 consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 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.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 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

² 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.

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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

6.3 Directors

Name of the shareholder	ID Number	Race	Gender

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Table (b) Details of the key personnel of the bidders' proposed team: (please refer to par 6.2.2 of Section 2 of this RFP document):

Name	Position	Proposed Role / Duties for the IDC
Total number of resources/ team dedicated to IDC:		

Table (c) Reference contact details for the bidder's suppliers: (please refer to par 6.2.3 of Section 2 of this RFP document):

Supplier Name	Printing Company (Yes/No)	Content Production Facility (Yes/No)	Branded collateral/merchandise services (Yes/No)	Name, title (designation), telephone contact and business email address of the supplier

Category Two

Table (d) Details of the bidder's experience in providing Corporation's brand marketing and communication services (please refer to Section 2 par 7.1.1):

Client' Name	Industry	Financial Sector (Yes/No)	Public Sector (Yes/No)	Project period (Start and End Dates)	Description of service performed and extent of Bidder's responsibilities	Name, title (designation), telephone contact and business email address of the client

Table (e) Details of the key personnel of the bidders' proposed team: (please refer to par 7.1.2 of Section 2 of this RFP document):

Name	Position	Proposed Role / Duties for the IDC
Total number of resources/ team dedicated to IDC:		

Table (f) Reference contact details for the bidder's suppliers: (please refer to par 7.1.3 of Section 2 of this RFP document):

Supplier Name	Printing Company (Yes/No)	Content Production Facility (Yes/No)	Branded collateral/merchandise services (Yes/No)	Name, title (designation), telephone contact and business email address of the supplier

Annexure 6: BEE Commitment Plan

The IDC encourages existing vendors and prospective bidders to support the objectives of B-BBEE and as far as possible strive to improve their B-BBEE contribution status. For bid evaluation purposes, bidders are allocated points in terms of a preference point system based on the Specific Goals which requires the bidder to have a valid B-BBEE certificate or a sworn affidavit in case of a EME or QSE.

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: Disclosure Statement

Disclosure Statement

In terms of the tender condition 8.6, which allows the IDC to conduct background checks on bidders and its shareholders and directors, the IDC hereby requires bidders to provide the following additional information:

- 9.1 The IDC considers the integrity of its appointed service providers to be of critical importance. The IDC reserves the right to disqualify from further consideration, any bidder whose integrity, based on past conduct (during the 5 years immediately preceding the bid submission date), it considers questionable.
- 9.2 To this end, the IDC requires each bidder to include in its bid, a disclosure statement which details the following (with sufficient information and supporting documentation for the IDC to make its own assessment as to the materiality or seriousness of allegations regarding the bidder's integrity or conduct):
 - 9.2.1 any criminal charges made against the bidder or any of its directors, shareholders or management officials regarding their professional conduct;
 - 9.2.2 any civil proceedings initiated against the bidder or any of its directors, shareholders or management officials regarding their professional conduct; and
 - 9.2.3 any other enquiry or similar proceedings initiated or threatened against the bidder or any of its directors, shareholders or management officials regarding their professional conduct.
- 9.3 Where the bidder is a consortium, the disclosure statement referred to in paragraph 9.2 above must be made separately in respect of each consortium partner
- 9.4 In the event that the bidder's circumstances change, after submission of its bid, in regard to any matter referred to in paragraph 9.2 above or in regard to any matter referred to in its disclosure statement, the bidder must submit a written notification to IDC indicating the nature and extent of such changed circumstances.
- 9.5 The IDC reserves the right to seek such additional information from any bidder, in respect of the disclosure statement referred to in paragraph 9.2 above, as it may, in its sole discretion, determine, whether such information has been requested under this RFP or otherwise, and may require the bidder to make oral presentations for clarification purposes or to present supplementary information, in respect of the disclosure statement if so required by the IDC.
- 9.6 Based on its own assessment of the contents of the bidder's disclosure statement and any publicly available information which is relevant to the contents of such disclosure statement, the IDC will decide whether the bidder's conduct or any allegations relating thereto pose a risk, reputational or otherwise, to the IDC; and if it reaches an adverse conclusion the IDC will in its sole discretion have the right to disqualify a bidder from further participation in the tender process. Disqualification on this ground may be done at any stage in the bid evaluation process prior to contract award.

Annexure 8: Local Content Declaration (If Relevant)

This Standard Bidding Document (SBD) must form part of all bids invited. It contains general information and serves as a declaration form for local content (local production and local content are used interchangeably).

Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed in the South African Bureau of Standards (SABS) approved technical specification number SATS 1286:2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration: Summary Schedule), D (Imported Content Declaration: Supporting Schedule to Annex C) and E (Local Content Declaration: Supporting Schedule to Annex C)].

1. General Conditions

- 1.1. A two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and specific goals.
- 1.2. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 1.3. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

$$LC = [1 - x / y] * 100$$

Where

x is the imported content in Rand

y is the bid price in Rand excluding value added tax (VAT)

Prices referred to in the determination of x must be converted to Rand (ZAR) by using the exchange rate published by South African Reserve Bank (SARB) on the date of advertisement of the bid as indicated in paragraph 3.1 below.

The SABS approved technical specification number SATS 1286:2011 is accessible on <http://www.thedtic.gov.za/sectors-and-services-2/industrial-development/industrial-procurement/> at no cost.

1.4. A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted as part of the bid documentation;

2. The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:

The minimum threshold for local content as published on the **dtic** website should be considered, and will become applicable to this requirement, **where relevant**. The **dtic's** latest list of designated sectors can be accessed on: <http://www.thedtic.gov.za/sectors-and-services-2/industrial-development/industrial-procurement/>. The IDC reserves the right to apply the most relevant specified local content minimum thresholds during the adjudication of this RFP. The inclusion of minimum local content thresholds is therefore included to this RFP by reference to the relevant website listed herein, for products listed (where applicable) if not specified herein.

<u>Description of services, works or goods</u>	<u>Stipulated minimum threshold</u>
_____	_____ %
_____	_____ %
_____	_____ %

3. Does any portion of the goods or services offered have any imported content?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

3.1 If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency on the date of advertisement of the bid.

The relevant rates of exchange information is accessible on www.resbank.co.za

Indicate the rate(s) of exchange against the appropriate currency in the table below (refer to Annex A of SATS 1286:2011):

Currency	Rates of exchange
----------	-------------------

US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

NB: Bidders must submit proof of the SARB rate (s) of exchange used.

- Where, after the award of a bid, challenges are experienced in meeting the stipulated minimum threshold for local content the dti must be informed accordingly in order for the dti to verify and in consultation with the AO/AA provide directives in this regard.

LOCAL CONTENT DECLARATION

(REFER TO ANNEX B OF SATS 1286:2011)

LOCAL CONTENT DECLARATION BY CHIEF FINANCIAL OFFICER OR OTHER LEGALLY RESPONSIBLE PERSON NOMINATED IN WRITING BY THE CHIEF EXECUTIVE OR SENIOR MEMBER/PERSON WITH MANAGEMENT RESPONSIBILITY (CLOSE CORPORATION, PARTNERSHIP OR INDIVIDUAL)

IN RESPECT OF BID NO.

ISSUED BY: IDC

NB

- The obligation to complete, duly sign and submit this declaration cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the bidder.
- Guidance on the Calculation of Local Content together with Local Content Declaration Templates (Annex C, D and E) is accessible on http://www.thedti.gov.za/industrial_development/ip.jsp. Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted with the bid documentation at the closing date and time of the bid in order to substantiate the declaration made in paragraph (c) below.** Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to continuously update Declarations C, D and E with the actual values for the duration of the contract.

I, the undersigned, (full names),
do hereby declare, in my capacity as
of(name of bidder
entity), the following:

- (a) The facts contained herein are within my own personal knowledge.
- (b) I have satisfied myself that:
 - (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286:2011; and
- (c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 3.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C:

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.

The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 3.1 above and the information contained in Declaration D and E.

- (d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.
- (e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 9 of the Preferential Procurement Regulations, 2022 promulgated under the Preferential Policy Framework Act (PPFA), 2000 (Act No. 5 of 2000) or in any other relevant law in the context of local content.

SIGNATURE: _____

WITNESS No. 1 _____

DATE: _____

WITNESS No. 2 _____

DATE: _____

Annexure 9: Privacy & Protection of Personal Information Act 4 of 2013 Requirements

Request for Proposal No:	
Name of Bidder:	
Authorised signatory:	

Protecting personal information is important to the Industrial Development Corporation (IDC). To do so, IDC follows general principles in accordance with applicable privacy laws and the Protection of Personal Information Act 4 of 2013 (POPIA).

IDC's role as a responsible party, is amongst others to process personal information for the intended purpose for which it was obtained and in line with legal agreements with its respective/ prospective clients, third parties, suppliers and operators.

Who is an Operator? A person or body/ entity which processes personal information for the IDC in terms of a contract or mandate.

Who is a Supplier? a natural or juristic person that provides a product or renders a service to the IDC. A supplier could also be considered as an operator, an independent responsible party or (together with IDC) a joint responsible party.

If the supplier or business partner provides IDC with its related persons' personal information, the supplier or business partner warrants that the related persons are aware of and have consented to the sharing and processing of their personal information with/by IDC. IDC will process the personal information of related persons as stated under a contractual agreement or as required by any related legislation.

Examples of the personal information of the supplier or business partner where relevant may include (but are not limited to): financial information, including bank statements provided to the IDC; - invoices issued by the supplier or business partner; the contract/ legal agreement between the IDC and the supplier or business partner; other identifying information, which includes company registration numbers, VAT numbers, tax numbers and contact details; marital status and matrimonial property regime (e.g. married in community of property); nationality; age; language; date of birth; education; financial history; identifying numbers (e.g. an account number, identity numbers or passport numbers); email address; physical address (e.g. residential address, work address or physical location); information about the location (e.g. geolocation or GPS location); telephone numbers; online and other unique identifiers; social media profile/s; biometric information (like fingerprints, facial recognition signature; race; gender; sex; criminal history).

Example of Special personal information is personal information about the following: - criminal behaviour, or any proceedings in respect of any offence allegedly committed by a data subject or the disposal of such proceedings; religious and philosophical beliefs; trade union membership; political beliefs; health, including physical or mental health, disability, and medical history; or biometric information (e.g., to verify identity).

RESPONSIBILITIES OF SUPPLIERS AND BUSINESS PARTNERS WHO ARE OPERATORS UNDER POPIA

Where a supplier or business partner, in terms of a contract or mandate, processes personal information for the IDC and is considered an operator of the IDC, the supplier or the business partner will be required to adhere to the obligations set out in the IDC data privacy or POPIA policy. This policy sets out the rules of engagement in relation to how personal information is processed by suppliers and business partners on behalf of the IDC as well as the minimum legal requirements that IDC requires the suppliers and business partners to adhere to, including compliance with POPIA as summarised in the below table.

Item	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	Yes	No
11.1	<p>Accountability</p> <p>The respective clients, third parties, suppliers and operators and its members will ensure that the provisions of POPIA, the guiding principles outlined in the policy and all the measures that give effect to such provisions are complied with at the time of the determination of the purpose and means of the processing and during the processing itself. In the event that an employee of the IDC or any person acting on behalf of the corporation who through their intentional or negligent actions and/or omissions fail to comply with the principles and responsibilities outlined, proper corrective measures will be applied.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
11.2	<p>Processing Limitation</p> <p>The respective clients, third parties, suppliers and operators and its members will ensure that information is only processed for the justifiable reason and processing is compatible with the purpose of the collection.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
11.3	<p>Purpose Specification</p> <p>All respective clients, third parties, suppliers and operators and its members will process personal information only for specific, explicitly defined, and legitimate reasons. The respective clients, third parties, suppliers and operators will inform IDC of reasons prior to collecting or recording their PI.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
11.4	<p>Further Processing Limitation</p> <p>Personal information will not be processed for a secondary purpose unless that processing is compatible with the original purpose. Thus, where the respective clients, third parties, suppliers and operators seek to process personal information it holds for a purpose for which it was originally collected, and where this secondary purpose is not compatible with the original purpose, respective clients, third parties, suppliers and operators will first obtain additional consent from the IDC.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
11.5	<p>Information Quality</p> <p>The respective clients, third parties, suppliers and operators will take reasonable steps to ensure that all personal information collected is complete, accurate and not misleading. Where PI is collected or received from third parties, the respective clients, third parties, suppliers and operators will take reasonable steps to confirm that the information is correct by verifying the accuracy of the information directly with the data subject or by way of independent sources.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
11.6	<p>Open Communication</p> <p>Reasonable steps will be taken by the respective clients, third parties, suppliers and operators to ensure that the IDC is notified of the purpose for which the information is being collected, used, and processed.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Item	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	Yes	No
11.7	Security Safeguards It is a requirement of POPIA for responsible parties, business partners and operators to adequately protect personal information. IDC will need to review suppliers or business partner security controls and processes to ensure that personal Information is compliant with the conditions of the lawful processing of personal information as set out in the POPIA. This would be a continuous monitoring and review that will be conducted by the IDC at its discretion.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
11.8	Data Subject Participation A data subject whose PI has been collected, stored, and processed by the respective clients, third parties, suppliers and operators must have communication channels to attend to may request for the correction or deletion of such information.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

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/ Entity: _____

Company/ Entity Registration Number: _____

Company/ Entity VAT Registration Number: _____

Signature (Company/ Entity Representative)

Date