



T51/11/24

**APPOINTMENT OF EXECUTIVE SEARCH
FIRMS ('HEAD-HUNTER') ON A PANEL OF
SERVICE PROVIDERS TO SOURCE AND
PLACE POTENTIAL EXECUTIVE, SENIOR
MANAGEMENT AND CRITICAL SPECIALIST
ROLES OF THE INDUSTRIAL
DEVELOPMENT CORPORATION.**

**BID CLOSING DATE:
21 JANUARY 2025 AT 11:00 AM**

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SECTION 1: GENERAL CONDITIONS OF BID

SECTION 1: GENERAL CONDITION 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: Mr Fhulufhedzani Kone

Telephone Number: Office: +27 11 269 3565

Email address: FhulufhedzaniK@idc.co.za

2.2. Enquiries in relation to this RFP will not be entertained after **16h00 PM on 13 January 2025**.

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

3.1. 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 **21 January 2025** 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 30 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 companies 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.
- 5.6. In the event that the bidding structure is a Prime Contractor with Sub-contractor/(s), then the Prime Contractor **must** hold the highest percentage allocation in terms of the value of the contract.

6. SUPPLIER PERFORMANCE MANAGEMENT

- 6.1. 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.
- 6.2. 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.
- 6.3. 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 financially advantageous to the IDC.
- 8.3.** The IDC reserves the right to conduct site visits at bidder's corporate offices and / or at client sites if so required.
- 8.4.** 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.
- 8.5.** 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.
- 8.6.** 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).
- 8.7.** The IDC reserves the right of final decision on the interpretation of its tender requirements and responses thereto.
- 8.8.** The IDC reserves the right to consider professional conduct and experiences it had with any bidder which rendered similar services to the IDC in the past 5 years over and above the references put forward by the bidder in its response.

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:

- 10.1.1. bidder whose Tax Status is non-compliant, after they have been notified accordingly and still remain non-compliant;
- 10.1.2. bidder who submit incomplete information and documentation according to the requirements of this RFP document;
- 10.1.3. bidder who submit information that is fraudulent, factually untrue, or inaccurate information;
- 10.1.4. bidder who receive information not available to other potential bidders through fraudulent means;
- 10.1.5. bidder who do not comply with any of the mandatory requirements as stipulated in the RFP document;
- 10.1.6. bidder who fail to comply with POPIA requirements as listed herein; and
- 10.1.7. bidder, as the prime contractor, who holds a lower percentage in terms of the value of the contract than any of its subcontractor/(s).

11. RETURNABLE SCHEDULES

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

11.1. Cover Page: (the cover page must clearly indicate the RFP reference number, bid description and the bidder's name)

11.2. Schedule 1:

- 11.2.1. Executive Summary (explaining how you understand the requirements of this RFP and the summary of your proposed solution)
- 11.2.2. Annexure 2 of this RFP document (duly completed and signed)

11.3. Schedule 2

- 11.3.1. Copy of Board Resolution, duly certified;
- 11.3.2. Originally certified copy of ID document for the Company Representative;
- 11.3.3. Annexure 3 of this RFP document (duly completed and signed);
- 11.3.4. Annexure 4 of this RFP document (duly completed and signed);
- 11.3.5. Annexure 5 of this RFP document (duly completed and signed);
- 11.3.6. Response to Annexure 6: BEE Commitment Plan;
- 11.3.7. 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).

- 11.3.8. Annexure 7 of this RFP document (duly responded to);
- 11.3.9. Annexure 8 of this RFP document (duly completed and signed, if applicable);

- 11.3.10. 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.
- 11.3.11. Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable).

11.4. Schedule 3:

- 11.4.1. Response to Section 2 of this document, in line with the format indicated in this RFP document.
- 11.4.2. Annexure 1 of this RFP document duly completed and signed.

11.5. Schedule 4: Price Proposal (response to Section 3 of this RFP document).

NOTE: Must be submitted as a separate file/document marked Schedule 4: Price Proposal)

12. EVALUATION CRITERIA AND WEIGHTINGS

Bids shall be evaluated in terms of the following process:

12.1. 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:

- IDC will make use of the Central Supplier Database (CSD) to access key information which is required to conduct supplier vetting including Company Registration status, tax compliance status and any other relevant checks conducted on CSD.
- In the event that the bidding structure is a Prime Contractor with Sub-contractor/(s), then IDC will evaluate the information provided in Annexure 2 (Acceptance of Bid Conditions and Bidder's Details) and if determined that the Prime Contractor holds a lower percentage in terms of the value of the contract than any of its subcontractor/(s), then the bid will be disqualified.
- Submission of ID copy for the Company Representative as referenced in 11.3.3 above.
- BEE Status Certification as referenced in 11.3.7 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: Bidders Experience & Project Team.
 - Annexure 2: Acceptance of Bid Conditions.
 - Annexure 3: Tax Compliance Requirements.
 - Annexure 4: Bidder's Disclosure.
 - Annexure 5: Shareholders' Information/ Group Structure.
 - Annexure 6: BEE Commitment Plan.
 - Annexure 7: Disclosure Statement.
 - Annexure 8: Privacy & Protection of Personal Information Act 4 of 2013 Requirements.

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

12.2. Phase 2: Technical/ Functionality Evaluation

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

12.2.1. Mandatory Functional/ Technical Requirements

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

Note: Failure to comply with the Mandatory Functional Requirements assessed in this phase will lead to disqualification of bids.

12.2.2. Other Functional/ Technical Requirements (Applicable for all Categories)

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
Membership with a professional/industry association	10
Bidder’s understanding of the IDC, required services and value add	10
Executive search methodology, approach and timelines	30
Bidder’s relevant experience	20
Relevant experience, skills and qualifications of the Core Team and non-core team servicing IDC as well as diversity of the team	30
TOTAL	100

Note: The minimum qualifying score for functionality is 70%. All bidders that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and Specific Goals.

12.3. 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

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 (if 80/20 system), and between 51% - 99.99% black owned entities will score 4 points (if 80/20 system).

³Black 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.

12.4. Phase 4: Objective Criteria

This contract will be awarded to the bidder scoring the highest points unless an objective criterion justifies the award of the tender to a bidder other than the highest scoring bidder.

12.4.1. Objective Criteria are:

The bidder must pose less risk to the IDC. The risk will be assessed in terms of, but not limited to, the following:

- Reputational Risk: This will be assessed in line with the bidder's disclosure (Refer to Annexure 7: Disclosure statement of this document).
- Concentration Risk: Over exposure to a single bidder.
- The bidder's financial capability in relation to the execution of the contract.
- The bidder's past performance in IDC contracts.

13. 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 12.3.

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

SECTION 2: FUNCTIONAL REQUIREMENTS

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 "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 IDC currently has a total staff compliment of approximately 855 permanent employees. The IDC structure and operating model is segmented into three distinct parts of the business being:

- **Operations Divisions** which include Mining, Metals infrastructure and Energy Division, Manufacturing Division, Agro Industries and Services Sectors Division, Industry Planning and Project Development Division and the COO Division.
- **Enabling Middle Office Divisions** which include Group Risk Division, Legal and Compliance Division, Strategy and Corporate Affairs Division Client Support and Growth Division.
- **Enabling Support Office Divisions** which include Group Finance Division, Human Capital Division, Group Company Secretary Division and Direct Reports Division (Internal Audit).

The IDC Leadership Structure (MANCO) aligns the key functions within the respective divisions within the IDC (see Annexure 9 attached). At full staffing complement, the IDC leadership structure currently comprises of thirteen (13) executive roles, forty-three (43) senior management (Head) roles and ten (10) Regional Manager roles that represent the IDC presence in the various Provinces across the country.

From time to time, there may be various leadership roles that need to be filled and require a credible executive search firm to assist with sourcing the required capability requirements for the IDC. In addition, due to natural attrition and/or changing business requirements that may occur, it may become necessary to source and recruit for other Executive, and/or Senior Management (Head) or Regional Manager roles. In addition, there may be instances where the Corporation requires sourcing and placement of Specialised critical roles below the leadership levels within the IDC.

Therefore, the IDC would like to appoint a panel of executive search service providers whose primary and core business model is that of executive search services. The appointed service providers will support the Corporation in the search, management and placement requirements of required roles that may become vacant or required in the business.

As the successful bidders undertakes the sourcing process for required roles, the provider will become au fait with the Corporation, the nature of the individuals who would be suitable

for the IDC in line with its mandate, the leadership brand to be built, the IDC business culture as well as the requisite skills, knowledge and experience required of the respective executive/senior management/Specialist critical roles.

In addition to the sourcing of suitable candidates for the IDC, the service provider appointed may also be required to manage and conclude on relevant psychometric assessments that will further validate and inform the suitability of candidates during the search and selection process. The service providers ultimately appointed on the panel will be required to align and integrate the assessment methodology and outcomes to that of the IDC Leadership competencies and assessment requirements. Cognisance must also be given of sharing of relevant assessment information to key decision makers in a concise, user-friendly format.

Lastly in enabling the search and placement process there may be unique service offering the executive search firm may offer post the appointment and placement process. Such services should be outlined and may be considered on a needs and ad hoc basis.

3. SCOPE OF WORK/TERMS OF REFERENCE

The Industrial Development Corporation (IDC) seeks to appoint suitably qualified and experienced service providers to provide Executive search services as and when required. The high-level scope of work includes the following:

- Conduct market research and intelligence on the availability of suitably qualified candidates for identified roles that may or may not be actively seeking new/alternative career opportunities.
- Identify and source potential candidates for Executive, Senior Management and specialist/critical roles as may be required that may be suitable for IDC opportunities.
- Provide and/or develop job profiles that may be required.
- Facilitate, in collaboration with IDC stakeholders the placement, management and response handling of roles that may be advertised in the media.
- Engage and provide candidate long lists and short lists to various stakeholders (Board members, Executive Management, Human Capital, Line Managers etc.)
- Undertake the end-to-end search and recruitment process for search assignments given to the service provider. Included but not limited to:
 - Develop and prepare interviews guides
 - Participate, co-ordinate and be involved in candidate interviews with the IDC as required.
 - Facilitate Psychometric Assessments and feedback sessions for shortlisted candidates to various stakeholders.
 - Conduct all relevant verification checks, referencing and background checks in line with the requirements of the IDC.
- In approaching and sourcing potential candidates to market the IDC as an employer of choice in the labour market.
- Facilitate the successful placement and conclusion of candidates to be appointed in collaboration with IDCs Human Capital Department.
- Provide on a needs basis optional value-added services that may be offered/required post appointment, e.g. Integration support, 90-day transitional plans and check ins, transitional support and feedback to the candidate and the line manager.
- Ensure effective management and close out of all candidates who applied for assigned positions.

The IDC would also like to promote transformation and development of small enterprises and as such will appoint companies in the following categories. The bidder must indicate, in the table below, with a **tick (✓)** the relevant category:

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

Note:

- **The bidder must submit their latest Financial Statements as proof of their annual turnover.**

- **Each category has its own evaluation criteria. The bidder must ensure that they provide the required response/ information to the evaluation criteria for service/ category the bidder is bidding for.**

4. PROJECT TIMELINES

The appointed service provider/s will be required to start immediately as and when an assignment becomes available and provide the services for a period of three (3) years, subject to annual review of service provider's performance.

5. TECHNICAL EVALUATION CRITERIA

5.2 Other Technical Requirements (Category 1: Small Entities)

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.

5.2.1 PRIMARY AND CORE NATURE OF BUSINESS & MEMBERSHIP WITH INDUSTRY/PROFESSIONAL BODY	Comply	Partially Comply	Not Comply
<p>The bidder must be a member of a registered recruitment industry/professional body e.g., African Professional Staffing Organisations (APSO) or Association of Executive Search Consultants (AESC) etc. The membership must be valid when submitting their response.</p> <p>Bidders must provide as part of this response proof of membership to confirm that the bidder is a member of any recruitment industry/professional body e.g., African Professional Staffing Organisations (APSO) or Association of Executive Search Consultants (AESC) etc</p>			
Substantiate / Comments			

5.2.2 BIDDER'S UNDERSTANDING OF IDC AND REQUIRED SERVICES	Comply	Partially Comply	Not Comply
<p>The understanding and interpretation of the assignment.</p> <p>Bidders must provide a summary of significant value additions they would bring to the IDC that would set them apart in this niche market.</p>			
Substantiate / Comments			

5.2.3 SEARCH APPROACH AND TYPICAL TIMELINES	Comply	Partially Comply	Not Comply
<p>The bidder must describe its methodology and process in undertaking an executive search assignment; specifically covering the following:</p> <ul style="list-style-type: none"> • All critical stages (search/evaluation/candidate assessment/ candidate reference checks/interviewing/placement and post placement support) must be included. • The stages the executive search firm participate and get involved in (e.g. Interviews, Board presentations etc.) 			

5.2.3 SEARCH APPROACH AND TYPICAL TIMELINES	Comply	Partially Comply	Not Comply
<ul style="list-style-type: none"> • The bidder must also provide an example of how the market intelligence reporting on an assignment will be presented to the IDC (provide a sample report) • The bidder must provide an example of the look & feel of candidate presentation to the IDC (provide a sample candidate presentation report) • The bidder must also provide an example of assessment outcomes reporting that would be presented to inform candidate selection (provide a sample assessment report) • Timelines for a typical executive search appointment (standard engagement) • Timelines for an expedited executive search process for “pressure to fill” positions indicating how this can be undertaken 			
Substantiate / Comments			

5.2.4 BIDDER’S RELEVANT EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must have relevant experience in the placement of executive/senior management/critical specialist positions from one or more of the following (but not limited to) industries:</p> <ul style="list-style-type: none"> • Financial services/Banking sector industry; • Development Finance and • State-Owned Entities. <p>The bidder must provide evidence of successful placements concluded over the last three years, indicating from the most recent placements, as follows:</p> <ul style="list-style-type: none"> • at least 2 executive position placements across various industries • at least 2 senior management/other critical specialist position placements across various industries. <p>The bidder must provide minimum four (4) relevant contactable references of similar work done in executive search placements. Please refer to Table (a) of Annexure 1 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.2.5 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE CORE TEAM AND NON-CORE TEAM AS WELL AS DIVERSITY OF THE TEAM	Comply	Partially Comply	Not Comply
<p>The bidder's proposed lead consultant and team must demonstrate a track record and proven experience in the provision of similar assignments.</p> <p>Lead Consultant: The proposed lead consultant must meet the following criteria:</p> <ul style="list-style-type: none"> • have a minimum of five (5) years individual experience in executive search, placement of executives and senior leaders/critical specialist positions • Experience of having had consulted/worked within and across the industry sectors indicated in 5.2.4 • Clearly articulate experience in engaging Executive teams and Boards <p>Team: The proposed team must meet the following criteria:</p> <ul style="list-style-type: none"> • must be a diversified team in line with employment equity considerations (gender, race etc.). • have a minimum of three (3) years individual experience in executive search, placement of executives and senior leaders • Experience of having had consulted/worked within and across the industry sectors indicated in 5.2.4. <p>The bidder must clearly articulate their teams' interactions with CEO's/Board members including presentations at Exco and Board level, indicating which stakeholders were engaged for the various assignments (Board, EXCO, etc.). Please refer to Table (b) of Annexure 1 of this document for the format in which the required information must be provided.</p> <p>The bidder must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • The structure and composition of the lead consultant and proposed team, clearly outlining the main disciplines/ specialties of this project and the key personnel responsible for each specialty. Please refer to Tables (b & c) of Annexure 1 of this document for the format in which the required information must be provided. • CVs of the key personnel, the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. 			
Substantiate / Comments			

5.3 Other Technical Requirements (Category 2: Medium Entities)

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.

5.3.1 PRIMARY AND CORE NATURE OF BUSINESS & MEMBERSHIP WITH INDUSTRY/PROFESSIONAL BODY	Comply	Partially Comply	Not Comply
<p>The bidder must be a member of a registered recruitment industry/professional body e.g. e.g., African Professional Staffing Organisations (APSO) or Association of Executive Search Consultants (AESC) etc. The membership must be valid when submitting their response.</p> <p>Bidders must provide as part of this response proof of membership to confirm that the bidder is a member of any recruitment industry/professional body e.g., African Professional Staffing Organisations (APSO) or Association of Executive Search Consultants (AESC) etc</p>			
Substantiate / Comments			

5.3.2 BIDDER’S UNDERSTANDING OF IDC AND REQUIRED SERVICES	Comply	Partially Comply	Not Comply
<p>The understanding and interpretation of the assignment.</p> <p>Bidders must provide a summary of significant value additions they would bring to the IDC that would set them apart in this niche market.</p>			
Substantiate / Comments			

5.3.3 SEARCH APPROACH AND TYPICAL TIMELINES	Comply	Partially Comply	Not Comply
<p>The bidder must describe its methodology and process in undertaking an executive search assignment; specifically covering the following:</p> <ul style="list-style-type: none"> • All critical stages (search/evaluation/candidate assessment/ candidate reference checks/interviewing/placement and post placement support) must be included. • The stages the executive search firm participate and get involved in (e.g. Interviews, Board presentations etc.) 			

5.3.3 SEARCH APPROACH AND TYPICAL TIMELINES	Comply	Partially Comply	Not Comply
<ul style="list-style-type: none"> • The bidder must also provide an example of how the market intelligence reporting on an assignment will be presented to the IDC (provide a sample report) • The bidder must provide an example of the look & feel of candidate presentation to the IDC (provide a sample candidate presentation report) • The bidder must also provide an example of assessment outcomes reporting that would be presented to inform candidate selection (provide a sample assessment report) • Timelines for a typical executive search appointment (standard engagement) • Timelines for an expedited executive search process for “pressure to fill” positions indicating how this can be undertaken 			
Substantiate / Comments			

5.3.4 BIDDER’S RELEVANT EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must have relevant experience in the placement of executive/senior management/critical specialist positions from one or more of the following (but not limited to) industries:</p> <ul style="list-style-type: none"> • Financial services/Banking sector industry; • Development Finance and • State-Owned Entities. <p>The bidder must provide evidence of successful placements concluded over the last three years, indicating from the most recent placements, as follows:</p> <ul style="list-style-type: none"> • at least 3 executive position placements across various industries • at least 3 senior management/other critical specialist position placements across various industries. <p>The bidder must provide minimum of six (6) relevant contactable references of similar work done in executive search placements. Please refer to Table (a) of Annexure 1 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.3.5 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE CORE TEAM AND NON-CORE TEAM AS WELL AS DIVERSITY OF THE TEAM	Compl y	Partially Comply	Not Comply
<p>The bidder's proposed lead consultant and team must demonstrate a track record and proven experience in the provision of similar assignments.</p> <p>Lead Consultant: The proposed lead consultant must meet the following criteria:</p> <ul style="list-style-type: none"> • have a minimum of five (5) years individual experience in executive search, placement of executives and senior leaders/critical specialist positions • Experience of having had consulted/worked within and across the industry sectors indicated in 5.3.4. • Clearly articulate experience in engaging Executive teams and Boards indicating which stakeholders were engaged for the various assignments (Board, EXCO, etc.) <p>Team: The proposed team must meet the following criteria:</p> <ul style="list-style-type: none"> • must be a diversified team in line with employment equity considerations (gender, race etc.). • have a minimum of three (3) years individual experience in executive search, placement of executives and senior leaders • Experience of having had consulted/worked within and across the industry sectors indicated in 5.3.4 <p>The bidder must clearly articulate their teams' interactions with CEO's/Board members including presentations at Exco and Board level. Please refer to Table (b) of Annexure 1 of this document for the format in which the required information must be provided.</p> <p>The bidder must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • The structure and composition of the lead consultant and proposed team, clearly outlining the main disciplines/specialties of this project and the key personnel responsible for each specialty. Please refer to Tables (b & c) of Annexure 1 of this document for the format in which the required information must be provided. • CVs of the key personnel, the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. 			
Substantiate / Comments			

5.4 Other Technical Requirements (Category 3: Large Entities)

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.

5.4.1 PRIMARY AND CORE NATURE OF BUSINESS & MEMBERSHIP WITH INDUSTRY/PROFESSIONAL BODY	Comply	Partially Comply	Not Comply
<p>The bidder must be a member of a registered recruitment industry/professional body e.g. e.g., African Professional Staffing Organisations (APSO) or Association of Executive Search Consultants (AESC) etc. The membership must be valid when submitting their response.</p> <p>Bidders must provide as part of this response proof of membership to confirm that the bidder is a member of any recruitment industry/professional body e.g., African Professional Staffing Organisations (APSO) or Association of Executive Search Consultants (AESC) etc</p>			
Substantiate / Comments			

5.4.2 BIDDER'S UNDERSTANDING OF IDC AND REQUIRED SERVICES	Comply	Partially Comply	Not Comply
<p>The understanding and interpretation of the assignment.</p> <p>Bidders must provide a summary of significant value additions they would bring to the IDC that would set them apart in this niche market.</p>			
Substantiate / Comments			

5.4.3 SEARCH APPROACH AND TYPICAL TIMELINES	Comply	Partially Comply	Not Comply
<p>The bidder must describe its methodology and process in undertaking an executive search assignment; specifically covering the following:</p> <ul style="list-style-type: none"> • All critical stages (search/evaluation/candidate assessment/ candidate reference checks/interviewing/placement and post placement support) must be included. • The stages the executive search firm participate and get involved in (e.g. Interviews, Board presentations etc.) 			

5.4.3 SEARCH APPROACH AND TYPICAL TIMELINES	Comply	Partially Comply	Not Comply
<ul style="list-style-type: none"> • The bidder must also provide an example of how the market intelligence reporting on an assignment will be presented to the IDC (provide a sample report) • The bidder must provide an example of the look & feel of candidate presentation to the IDC (provide a sample candidate presentation report) • The bidder must also provide an example of assessment outcomes reporting that would be presented to inform candidate selection (provide a sample assessment report) • Timelines for a typical executive search appointment (standard engagement) • Timelines for an expedited executive search process for “pressure to fill” positions indicating how this can be undertaken 			
Substantiate / Comments			

5.4.4 BIDDER’S RELEVANT EXPERIENCE	Comply	Partially Comply	Not Comply
<p>The bidder must have relevant experience in the placement of executive/senior management/critical specialist positions from one or more of the following (but not limited to) industries:</p> <ul style="list-style-type: none"> • Financial services/Banking sector industry; • Development Finance and • State-Owned Entities. <p>The bidder must provide evidence of successful placements concluded over the last three years, indicating from the most recent placements, as follows:</p> <ul style="list-style-type: none"> • at least 6 executive position placements across various industries • at least 6 senior management/other critical specialist position placements across various industries. <p>The bidder must provide minimum of twelve (12) relevant contactable references of similar work done in executive search placements. Please refer to Table (a) of Annexure 1 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.4.5 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE CORE TEAM AND NON-CORE TEAM AS WELL AS DIVERSITY OF THE TEAM	Comply	Partially Comply	Not Comply
<p>The bidder's proposed lead consultant and team must demonstrate a track record and proven experience in the provision of similar assignments.</p> <p>Lead Consultant: The proposed lead consultant must meet the following criteria:</p> <ul style="list-style-type: none"> • have a minimum of five (5) years individual experience in executive search, placement of executives and senior leaders/critical specialist positions • Experience of having had consulted/worked within and across the industry sectors indicated in 5.4.4 • Clearly articulate experience in engaging Executive teams and Boards indicating which stakeholders were engaged for the various assignments (Board, EXCO, etc.) in <p>Team: The proposed team must meet the following criteria:</p> <ul style="list-style-type: none"> • must be a diversified team in line with employment equity considerations (gender, race etc.). • have a minimum of three (3) years individual experience in executive search, placement of executives and senior leaders • Experience of having had consulted/worked within and across the industry sectors indicated in 5.4.4 <p>The bidder must clearly articulate their teams' interactions with CEO's/Board members including presentations at Exco and Board level. Please refer to Table (b) of Annexure 1 of this document for the format in which the required information must be provided.</p> <p>The bidder must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • The structure and composition of the lead consultant and proposed team, clearly outlining the main disciplines/specialties of this project and the key personnel responsible for each specialty. Please refer to Tables (b & c) of Annexure 1 of this document for the format in which the required information must be provided. • CVs of the key personnel, the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. 			
Substantiate / Comments			

SECTION 3: COST 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. The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.	Comply	Not Comply
Substantiate / Comments		

7. COSTING MODEL

- Bidders must note that the estimated average annual salaries reflected below are ONLY for comparison (evaluation) purposes.
- Bidders are required to provide a placement fee and percentage (%) from Year 1 to Year 3 on the below table:
- Placement percentage quoted by the bidder for Year 1 to Year 3 will be subject to negotiation for the duration of the contract.
- The percentage quoted for year 1 to Year 3 will be used to select the bidders to be included on the panel.

- Price and Preference evaluation will be done separately for each category to determine bidders to be included on to the panel.

7.1. Table A: Executive Search process resulting in an External Appointment

Description		
	%	Fee R
Executive Management placement (estimated average annual salary R 4 000 000)		
Senior Management placement (estimated average annual salary R 2 500 000)		
Critical Specialist position placement (estimated average annual salary R 1 800 000)		
Total Cost for Year 1 (VAT Excl.)		
Total Cost for Year 2 (VAT Excl.)		
Total Cost for Year 3 (VAT Excl.)		
Sub-total (VAT Excl.)		
VAT (15%)		
Total for Table A (VAT Incl.)		

Breakdown of what is included in the % placement fee and R value

Executive Management placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Senior Management placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Critical Specialist position placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

7.2. Table B: Executive Search process resulting in an Internal Appointment

Description		
	%	Fee R
Executive Management placement (estimated average annual salary R 4 000 000)		
Senior Management placement (estimated average annual salary R 2 500 000)		
Critical Specialist position placement (estimated average annual salary R 1 800 000)		
Total Cost for Year 1 (VAT Excl.)		
Total Cost for Year 2 (VAT Excl.)		
Total Cost for Year 3 (VAT Excl.)		
Sub-total (VAT Excl.)		
VAT (15%)		
Total for Table A (VAT Incl.)		

Breakdown of what is included in the % and R value

Executive Management placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Senior Management placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Critical/Specialist position placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

7.3. Table C: Appointments of candidates on a Placement Fee Basis

- The cost for individuals placed in the Corporation where the Search Firm identified/sourced/introduced potential candidates that can be considered for placement opportunities, but the placement was not due to an exclusive search process (i.e. fee % based on successful placement of a candidate introduced on placement)

Description		
	%	Placement Fee R
Executive Management placement (estimated average annual salary R 4 000 000)		
Senior Management placement (estimated average annual salary R 2 500 000)		
Critical Specialist position placement (estimated average annual salary R 1 800 000)		
Total Cost for Year 1 (VAT Excl.)		
Total Cost for Year 2 (VAT Excl.)		
Total Cost for Year 3 (VAT Excl.)		
Sub-total (VAT Excl.)		
VAT (15%)		
Total for Table A (VAT Incl.)		

Breakdown of what is included in the % placement fee and R value

Executive Management placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Senior Management placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Critical Specialist position placement

Description	Cost (VAT Excl.)
Sub-Total Placement Fee	
VAT (15%)	
Total (VAT Incl.)	

Total Bid Price (Table A + B + C) (VAT INCL.)	
--	--

7.4. Table D: Ad hoc Costs

The IDC may require bidders to provide Ad hoc Services as per below therefore bidders are requested to provide ad-hoc cost as per below:

Description	Cost (VAT Excl.)
Response handling per 100 candidates	
Recruitment check costs (if not included in the % fee structure above)	
Assessment costs for top two candidates (if not included in the % fee structure above)	
Assessment costs for each additional candidate	
Other costs of ad-hoc services offered e.g. transitional coaching support – state type of service and cost per candidate	
Type of Service	
Disbursements (Please specify if there are other costs)	

Breakdown of what is included in the Recruitment check costs and other costs of ad-hoc services offered,

Recruitment check costs

Description	Cost (VAT Excl.)
Reference checks	
Credit checks	
ID checks	
Criminal checks	
Matric check	
Qualification checks	
Social media checks	
Directorships checks	
Watchlist and sanctions screening checks	
SAFPS Fraud check	
Driver's license check	
Professional Associations checks	

Other costs of ad-hoc services offered

Description	Cost (VAT Excl.)

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

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

Notes on pricing:

- **The total cost for executive /senior management/ critical specialist positions placement services is a percentage of total Cost to Company on Guaranteed Remuneration and all Guaranteed Benefits (excluding VAT) at time of appointment of the successful candidate. This cost will apply on each placement that may result**

due to an external candidate placement. The service provider is required to indicate the payment terms and conditions as well as all the services and value-added aspects included in this costing model.

- The total cost for executive senior management/critical specialist positions placement services is a percentage of total Cost to Company on Guaranteed Remuneration and all Guaranteed Benefits at time of appointment of a successful candidate. This cost will apply on each placement that may result due to an internal candidate placement. The service provider is required to indicate the payment terms and conditions as well as all the services and value-added aspects included in this costing model.
- The total cost of any additional services for executive/senior management/critical specialist position placement services not included in above must be included under disbursements. For example, additional Assessment Costs, Transition support/coaching etc.
- The cost for individuals placed in the Corporation where the Search Firm identified/sourced/introduced potential candidates that can be considered for placement opportunities, but the placement was not due to an exclusive search process (i.e. fee % based on successful placement of a candidate introduced on placement)
- 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.

PRICE DECLARATION FORM

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. **T51/11/24**, the General Conditions, and all other Annexures to the RFP Document, we offer to render the required executive search services to IDC 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: RESPONSE FORMAT FOR SECTION 2

Bidder's Experience and the proposed Project Team

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

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

Table (a) Details of the bidder's current and past experience in providing executive search services (please refer to par 5.2, 5.3, and 5.3 of Section 3):

Client' Name	Position name (e.g. CFO)	Industry where placed	Placement Date	Description of service performed and extent of Bidder's responsibilities	Name, title and telephone contact of client
Executive Management placement					

ANNEXURE 2: 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 that are registered on the Central Supplier Database (CSD) of National Treasury are 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	
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 3: 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)?
 YES NO
- 2.2 DOES THE BIDDER HAVE A BRANCH IN THE RSA?
 YES NO
- 2.3 DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?
 YES NO
- 2.4 DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?
 YES NO

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.

SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	
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ANNEXURE 4: 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

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

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.

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 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

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.

ANNEXURE 5: SHAREHOLDERS AND DIRECTORS INFORMATION

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

1 Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% Shares

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

2 Trust Information

With reference to point 8.6 IDC Rights, should a trust form part of the Company / Group structure then the following must be submitted as part of your proposal.

Documents necessary to verify the Identity of a Trust	<input type="checkbox"/> Copy of trust deed or other founding document by which trust is created. <input type="checkbox"/> Letters of authority (as issued by the Master of the High Court) <input type="checkbox"/> Personal details of each Trustee, each Beneficiary, the Founder, and the person authorised to act on behalf of the Trust
--	---

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

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

4 Directors

Name of the shareholder	ID Number	Race	Gender

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

CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT.

.....

Signature

Date

.....
Position

.....
Name of bidder

ANNEXURE 6: 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

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:

1. The IDC considers the integrity of its appointed service providers to be of critical importance. The IDC reserves the right to apply its objective criteria to award to any bidders whose integrity, based on past conduct (during the 5 years immediately preceding the bid submission date), it considers questionable.
2. To this end, the IDC requires each bidder to include in its bid, a disclosure statement which details the following (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): any criminal charges made against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct;
 - 2.1. any civil proceedings initiated against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct; and
 - 2.2. 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.
3. Where the bidder is a consortium, the disclosure statement referred to in paragraph 2.2 above must be made separately in respect of each consortium partner.
4. In the event that the bidder's circumstances change, after submission of its bid, regarding any matter referred to in paragraph 2.2 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.
5. The IDC reserves the right to seek such additional information from any bidder, in respect of the disclosure statement referred to in paragraph 2.2 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.
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 not to award a contract or order.

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF: COMPANY NAME

Tel No

Fax No

Cell No

ANNEXURE 8: 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
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"/>
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"/>
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"/>
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"/>
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"/>
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
7.	<p>Security Safeguards</p> <p>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.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.	<p>Data Subject Participation</p> <p>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.</p>	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

ANNEXURE 9: IDC HIGH LEVEL STRUCTURE

