



**T05-02-25**

**REQUEST FOR PROPOSAL TO ASSIST  
THE IDC WITH THE IMPLEMENTATION  
OF A CLIENT EXPERIENCE  
MANAGEMENT PROGRAMME**

**BID CLOSING DATE:  
10 MARCH 2025 AT 11:00 AM**

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**SECTION 1: GENERAL CONDITIONS OF BID**

## SECTION 1: GENERAL CONDITION OF BID

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### 1. PROPRIETARY INFORMATION

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

### 2. ENQUIRIES

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

Name: Amelia Rawstorne

Telephone Number: +27 11 269 3338

Email address: [Ameliar@idc.co.za](mailto:Ameliar@idc.co.za)

2.2. Enquiries in relation to this RFP will not be entertained after 16h00 on 28 February 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](http://www.idc.co.za)) under tenders i.e., next to the same RFP document.

2.4. The IDC may respond to any enquiry in its absolute discretion and the bidder acknowledges that it will have no claim against the IDC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

### 3. BID VALIDITY PERIOD

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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

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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 10 March 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](mailto: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](mailto: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](mailto: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](mailto: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

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- 5.1. All the documentation submitted in response to this RFP must be in English.
- 5.2. The bidder is responsible for all the costs that it shall incur related to the preparation and submission of the bid document.
- 5.3. Bids submitted by bidders which are 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

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- 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

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

## **8. IDC'S RIGHTS**

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- 8.1.** The IDC is entitled to amend any bid 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 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.
- 8.5.** 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).
- 8.6.** The IDC reserves the right of final decision on the interpretation of its tender requirements and responses thereto.
- 8.7.** 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**

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- 9.1.** By submitting a bid in response to the RFP, the bidder will be taken to offer to render all or any of the services described in the bid response submitted by it to the IDC on the terms and conditions and in accordance with the specifications stipulated in this RFP document.
- 9.2.** The bidder shall prepare for a possible presentation should IDC require such and the bidder will be required to make such presentation within five (5) days from the date the bidder is notified of the presentation. Such presentation may include a practical demonstration of products or services as called for in this RFP.
- 9.3.** The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the IDC during the bid validity period indicated in 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**

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**10.1.** The IDC reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder:

- 10.1.1. bidder whose Tax Status is non-compliant, after they have been notified accordingly and remain non-compliant;
- 10.1.2. bidder who submits incomplete information and documentation according to the requirements of this RFP document;
- 10.1.3. bidder who submits information that is fraudulent, factually untrue, or inaccurate information;
- 10.1.4. bidder who receives information not available to other potential bidders through fraudulent means;
- 10.1.5. bidder who does not comply with any of the mandatory requirements as stipulated in the RFP document;
- 10.1.6. bidder who fails 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**

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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 1 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 2 of this RFP document (duly completed and signed);
- 11.3.4. Annexure 3 of this RFP document (duly completed and signed);
- 11.3.5. Annexure 4 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 5 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**

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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: 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: 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. Technical Requirements

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:

No	ELEMENT	WEIGHT
1	Bidder's relevant experience	30
2	Methodology	30
3	Qualifications and skills of key personnel	25
4	Project plan	15
<b>TOTAL</b>		<b>100</b>

**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 <sup>1</sup>	20
<b>TOTAL</b>	<b>100</b>

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

SPECIFIC GOALS	POINTS
	(80/20 system)
Black ownership <sup>2</sup>	10
30% Black women ownership	5
Any % of ownership by Black Designated Groups <sup>3</sup>	2
Reconstruction Development Programme Objective: Promotion of SMMEs (Entities that are EME or QSE)	3
<b>TOTAL POINTS</b>	<b>20</b>

<sup>2</sup>Black 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)

<sup>3</sup>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.

#### **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**

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

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### 1. SPECIAL INSTRUCTIONS TO BIDDERS

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

### 2. BACKGROUND INFORMATION

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The Industrial Development Corporation (“IDC”) has historically conducted an annual client satisfaction survey. Scores and insights have remained fairly consistent while detailed insights from operational indicators and client’s experiences have not translated into actionable outcomes directly linked to pain points experienced by clients.

IDC serves clients through direct channels (i.e. funding directly to the client) and indirectly (i.e. through implementation partners). Funding offered to clients is delivered through sector based strategic business units (offering debt and equity funding) and through a dedicated programmes unit (grants and debt funding). (An organogram and the IDC Corporate Profile Brochure are attached as Annexure 9).

Currently IDC conducts quarterly surveys in-house through short telephonic interviews to assess the client’s experience of the pre-approval processes. An annual survey is conducted through an independent service provider in order to obtain a client satisfaction score for KPI purposes and to gain independent insights into the client experience. The annual survey is typically conducted telephonically, and a sample is supplemented through the use of online surveys sent to clients who are unable or unwilling to participate in a telephonic interview.

The surveys are undertaken to assess client satisfaction, identify areas for improvement, and gain insights into client needs and expectations. These surveys as part of a client experience programme should be relevant to the particular segments, provide an understanding of client expectations and satisfaction and propose actions that need to be taken to remedy areas of concern. The insights gained from the survey will assist in prioritising interventions to effectively deliver our client value proposition.

The IDC has an existing **Client Experience Framework** (attached as Annexure 10) to realise a positive impact on client loyalty, retention and revenue growth by delivering consistent client experience. The current framework is aligned to the IDC’s deal development process and includes components such as strategic and tactical surveys, complaints management, operational performance metrics, social media insights, activation activities and benchmarking. **IDC is looking to effectively implement the framework and align it to business processes and data collection to advance the maturity of client experience within the organisation using the existing framework.**

The proposal should recommend an appropriate, best practice approach to implement a client experience management programme, together with recommendations on optimal approaches to tactical and strategic surveys and other consideration on client experience management to leverage internal data, optimize insights from client touch points, address key pain points and drive operational and product excellence.

Most importantly the proposed client experience management programme and analysis of findings should provide the IDC with clear, actionable recommendations that can be implemented and will help improve processes, contribute to effective product design and delivery and strengthen relationships with clients, while also identifying areas that could potentially impede the corporation’s ability to attract new ones.

The IDC is a multi-faceted corporation whose activities span across various sectors of the economy. For more information on the IDC business, please visit our website [www.idc.co.za](http://www.idc.co.za).

### 3. SCOPE OF WORK/TERMS OF REFERENCE

The appointed Service Provider will be required to provide the following services (spread out in two phases):

#### 3.1 Year 1 (2024-2025): Data Collection, Analysis of data, Strategic Alignment and Implementation

Activity	Actions
<b>Feedback Deployment</b>	
<p><b>1. Annual Client Experience Survey</b></p> <p>A database of clients (<b>CEO/director level</b> to be interviewed or key contact persons) for the annual survey.</p> <p>The sample of clients will be representative of the numbers of clients within the IDC across the client life cycle.</p> <p>IDC has 800 clients across the value chain.</p>	<ul style="list-style-type: none"> <li>• Conduct an Annual Client Satisfaction Survey for the <b>2024/2025</b> financial year ensuring comparability to the previous satisfaction scores while establishing a new base line for actionable insights, using an existing questionnaire that can be used to collect qualitative and quantitative data from our clients. The questionnaire consists of thirty (30) single response questions and seven (7) open ended questions and should take about 15-20 minutes to complete.</li> <li>• Recommend optimal survey approach aligned to client preference (e.g. telephone, online, SMS, WhatsApp, WEB, USSD, IVR, CATI and face to face etc.) with clear motivation of approaches to achieve optimal insights.</li> <li>• Propose and implement other methods or strategies to increase the client response rate.</li> <li>• Recommend a client satisfaction index and approach to determine the client satisfaction levels.</li> <li>• Analyse findings (overall and attributes ratings on products &amp; services, service efficiency, client interface).</li> <li>• Identify critical areas of improvement and opportunities in the IDC service offering and processes.</li> <li>• Compile a detailed report summarizing the survey findings, analysing the results, and identifying key insights.</li> <li>• Provide actionable recommendations to address areas of improvement based on client feedback.</li> <li>• Present the final report to relevant stakeholders, including Executive Committee and Management committee</li> </ul>

Activity	Actions
<b>Strategic Alignment and Planning</b>	
<p><b>2. Continuous Improvement and embedding client experience throughout the organisation</b></p> <p>Identifying clear business objectives</p>	<p>❖ <b>Training</b></p> <p>Develop and deliver a comprehensive train the trainer programme as part of our client experiences management initiative. This programme would be for up to 10 individuals and should include the following components:</p> <ul style="list-style-type: none"> <li>- Training design and development: develop customisable training tailored to the IDC's needs;</li> <li>- Facilitation skills: train our trainers on effective facilitation techniques including strategies for managing group dynamics and engaging participants;</li> <li>- Subject matter expertise: ensure trainers develop a deep understanding of client experience management and establish a base for on-going updates on latest trends and best practice;</li> <li>- Assessment and feedback: implement methods for assessing trainee understanding and progress and train trainers on providing constructive feedback as a base for continuous improvement;</li> <li>- Coaching and mentoring: leverage the coaching and mentoring approach in the IDC to support trainers to foster a supportive learning environment to encourage continuous development.</li> </ul> <p>❖ <b>Interactive solutions and workshopping</b></p> <p>The appointed service provider should facilitate interactive client experience workshops with key internal stakeholders to identify root causes and co-create 'implementation solutions and remedial actions to address key issues and challenges identified. These workshops should include best practice solutions to identifying root causes, solutions and innovation.</p>

### 3.2 Year 2 (2025-2026) – Execution and embedding

Activity	Actions
<b>Execution and embedding</b>	
<p><b>Continuous Improvement and embedding client experience throughout the organisation</b></p>	<ul style="list-style-type: none"> <li>• Update or amend survey based on insights gained through the training process, client journey work and insights from point in time and annual survey.</li> <li>• Support IDC in development, management and review of implementation plan on embedment of client experience management and actionable insights from surveys and organisational data and insights.</li> <li>• Ongoing workshops to optimise Customer Journey Map</li> </ul>
<b>Feedback Deployment</b>	
<p><b>Annual Client Satisfaction Survey</b></p> <p>Sample to be optimally determined to maximise insights based on previous survey insights and understanding of the business.</p>	<ul style="list-style-type: none"> <li>• Design a questionnaire that can be used to collect qualitative and quantitative data from our clients leveraging best practice approaches and research methodologies</li> <li>• Conduct an Annual Client Satisfaction Survey for the <b>2025/26, 26/2027 and 27/2028</b> financial years utilising optimal technologies aligned to client preference and optimising insights.</li> <li>• Propose and implement other methods or strategies to increase the client response rate.</li> </ul>

Activity	Actions
	<ul style="list-style-type: none"> <li>• Utilise established client satisfaction scoring and ensure insights across sectors and stages in the deal development process.</li> <li>• Identify critical areas of improvement and opportunities in the IDC offering and processes;</li> <li>• Compile a detailed report summarizing the survey findings, analysing the results, and identifying key insights;</li> <li>• Provide actionable recommendations to address areas of improvement based on client feedback;</li> <li>• Present the final report to relevant stakeholders, including senior management and department heads.</li> </ul>

#### 4. RESEARCH APPROACH / METHODOLOGY

The IDC clients are spread across the country, with some clients in the rest of Africa, requiring an optimal approach to be recommended by the service provider to ensure response rates and insights are optimised.

Results for surveys to be compiled and presented as follows:

- Overall IDC results;
- Results at Divisional level; and
- Results at Strategic Business Unit level.

#### 5. DELIVERABLES

The service provider will be expected to prepare comprehensive reports for:

Annual Client Experience Survey	1x annual report per year
Train the Trainer Programme	Training, design, implementation and tools for management of train the trainer intervention.
Customer Journey Workshops	Minimum of 10 customer journey workshops to embed client centric thinking and solution for enhancements and innovation in customer journeys.

The reports should outline the below findings:

- An electronic copy of the comprehensive report of the work done in each phase, in Microsoft PowerPoint and raw data in Microsoft Excel
- Provide overall recommendations to enhance client experience.
- Incorporate the Voice of the Client as derived from the surveys and complaints to drive continuous improvement, the IDC's strategic objectives and the advancement of existing products or development of new ones.

#### 6. PROJECT TIMELINES

The appointed bidder will be required to start immediately after signing the contract and provide the services for a period of two (2) years with an option to renew on an annual basis for a maximum of two (2) years, subject to annual review of bidder's performance.

## 7. TECHNICAL EVALUATION CRITERIA

### 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 have similar and relevant experience in <b>client experience management</b> within the Development Finance Institution (DFI) and/or financial institutions and/or banking environment.</p> <p>The bidder must have experience in the facilitation of interactive client experience workshops with key internal stakeholders to identify root causes and co-create implementable solutions and remedial actions to address key issues and challenges identified.</p> <p>The bidder must have experience in designing and running of <b>surveys</b>; implementing client experience management programmes including surveys to plus or minus 500 respondents at CEO/director level or equivalent. The bidder must have the relevant experience in engaging with clients on any channel: responsive and branded email surveys, web intercepts, mobile in-app feedback, SMS and messaging channels, social feedback and reviews, IVR systems, call and chat transcripts, and through connected IoT devices.</p> <p>The bidder must have experience in developing and delivering a comprehensive train the trainer programme.</p> <p><b>The bidder must provide a minimum of three (3) references of similar work done for a DFI/financial institutions and/or banks in the past three (3) years.</b></p> <p><b>Bidders must submit as part of this proposal three previous questionnaires and presentations of findings used for the references provided above on 7.1.1.</b></p> <p><i>For POPIA compliance bidder can remove logo/branding/name of companies.</i></p> <p>Please refer to <b>(Table a) Annexure</b> of this document for the format in which the required formation must be provided.</p>			
<b>Substantiate / Comments</b>			



7.1.2 METHODOLOGY	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder must demonstrate thorough understanding of the objectives and deliverables as outlined in the scope of work in the bid document.</p> <p>The bidder must provide a detailed approach/methodology that will be used in order to deliver in line with the requirements stated in the scope of work of the bid document.</p> <p>The methodology must cover, amongst other things, but not be limited to the following: -</p> <ul style="list-style-type: none"> <li>• Conduct telephonic interviews with Clients and/or use other proposed methods (online surveys - via SMS, WhatsApp and e-mail etc.)</li> <li>• Analyse findings (overall, divisional and business unit) and identify critical areas of improvement and opportunities in the IDC service offering;</li> <li>• Prepare a report on findings and recommendations;</li> <li>• Document and map expectations and needs of identified IDC clients;</li> <li>• Use a client satisfaction index totalling to 10 points (scale) for the annual survey to determine the current satisfaction levels of IDC clients.</li> <li>• Approach for the bespoke client experience training which will focus on continuous improvement efforts throughout the year</li> </ul>			
<p><b>Substantiate / Comments</b></p>			

7.1.3 QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's key personnel of the proposed team must have relevant qualifications, skills and experience:</p> <ul style="list-style-type: none"> <li>• In project managing surveys for client experience management.</li> <li>• In moderating and facilitating interactive sessions for cross functional stakeholders.</li> <li>• In training design and development (developing customisable training).</li> </ul> <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> <li>• The structure and composition of the proposed team, clearly outlining the main disciplines/ specialities <b>of this project</b> and the key personnel responsible for each specialty.</li> <li>• CVs of the team and key personnel; and the CVs must clearly highlight qualifications, areas of experience in implementation of client experience management programmes e.g. Client satisfaction surveys, training and workshops.</li> </ul> <p><b>Please refer to Table (b) Annexure 1 of this document for the format in which the required information must be provided.</b></p>			
<b>Substantiate / Comments</b>			

7.1.4 PROJECT PLAN	Comply	Partially Comply	Not Comply
<p><b>The bidder should provide a detailed project plan, which is to include key activities, timelines, and milestones / deliverables. E.g. Gantt chart, MS project etc. as per scope of work per phase.</b></p> <ul style="list-style-type: none"> <li>• The Annual Client Satisfaction Survey for the <b>2024/2025</b> financial year should be completed within eight (8) weeks after appointment.</li> <li>• Progress meetings once a week with the IDC team.</li> </ul>			
<b>Substantiate / Comments</b>			

**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
<b><i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i></b>		

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. COSTING MODEL

### 6.1 Annual Client Experience Survey Using Current Questionnaire

The existing questionnaire consist of thirty (30) single response questions and seven (7) open ended questions and should take about 15-20 minutes to complete.

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Inception				
Data collection				
Analysing the data				
Feedback and recommendations				
<b>Sub-Total Price 6.1 (VAT Excl.) Year 1 (2024 – 2025)</b>				
<b>VAT at 15% (if applicable)</b>				
<b>Sub-Total Price 6.1 (VAT Incl.) Year 1 (2024 – 2025)</b>				

## 6.2 Continuous Improvement and embedding client experience

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Training of 10 individuals				
Facilitation of 10 customer journey workshops (internal stakeholders)				
<b>Sub-Total Price 6.2 (VAT Excl.) Year 1 (2024 – 2025)</b>				
<b>VAT at 15% (if applicable)</b>				
<b>Sub-Total Price 6.2 (VAT Incl.) Year 1 (2024 – 2025)</b>				

## 6.3 Annual Client Experience Survey (Design of new questionnaire)

Design a questionnaire that can be used to collect qualitative and quantitative data from our clients leveraging best practice approaches and research methodologies

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Design of new questionnaire				
Data collection				
Analysing the data				
Feedback and recommendations				
<b>Sub-Total Price 6.3 (VAT Excl.)</b>				
<b>VAT at 15% (if applicable)</b>				
<b>Sub-Total Price 6.3 (VAT Incl.) Year 2 (2025 - 2026)</b>				
<b>Sub-Total Price 6.3 (VAT Incl.) Year 3 (2026 - 2027)</b>				
<b>Sub-Total Price 6.3 (VAT Incl.) Year 4 (2027 - 2028)</b>				

## 6.4 Annual Client Experience Survey (Design of new questionnaire)

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Cost (VAT Excl.)
Training of 10 individuals in terms of the new questionnaire				
Facilitation of 10 customer journey workshops (internal stakeholders)				
<b>Sub-Total Price 6.4 (VAT Excl.)</b>				
<b>VAT at 15% (if applicable)</b>				
<b>Sub-Total Price 6.4 (VAT Incl.) Year 2 (2025 - 2026)</b>				
<b>Sub-Total Price 6.4 (VAT Incl.) Year 3 (2026 - 2027)</b>				
<b>Sub-Total Price 6.4 (VAT Incl.) Year 4 (2027 - 2028)</b>				

## 6.5 Summary of the Total Bid Price

Sub-Total Price 6.1 (VAT Incl.) Year 1 (2024 - 2025)	R
Sub-Total Price 6.2 (VAT Incl.) Year 1 (2024 - 2025)	R
Sub-Total Price 6.3 (VAT Incl.) Year 2 (2025 - 2026)	R
Sub-Total Price 6.3 (VAT Incl.) Year 3 (2026 - 2027)	R
Sub-Total Price 6.3 (VAT Incl.) Year 4 (2027 - 2028)	R
Sub-Total Price 6.4 (VAT Incl.) Year 2 (2025 - 2026)	R
Sub-Total Price 6.4 (VAT Incl.) Year 3 (2026 - 2027)	R
Sub-Total Price 6.4 (VAT Incl.) Year 4 (2027 - 2028)	R
Disbursements	R
<b>Total Bid Price Incl VAT</b>	R

### Notes on pricing:

- Disbursements (incidental expenses other than professional fees e.g. travel and accommodation, printing costs, venue hire, and equipment hire etc.) must be clearly defined, outlining all assumptions. It is of utmost importance to submit clear and comprehensive cost proposals to allow the IDC to fairly compare bid price / cost proposals. If there is no additional fee envisaged for Disbursements, then the bidder must clearly indicate “No Charge / Free of Charge”. Failure to clearly indicate this, would result in IDC penalising your bid response by taking the cost of the highest bidder and adding 50% thereto and apply this rate for purposes of price comparisons. Bidders are therefore requested to respond clearly and comprehensively on this aspect of their bid response.
- The bidder must provide a detailed breakdown of the Disbursements as follows:

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

Cost Element	Cost (VAT Excl.)
<b>Total Disbursements</b>	

## 7. SUMMARY OF THE PROPOSAL

DESCRIPTION	BIDDER'S PROPOSAL
Number of resources (personnel)	
Commencement Date	

**PRICE DECLARATION FORM**

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. **T05-02-25**, the General Conditions, and all other Annexures to the RFP Document, we offer to assist with the implementation of a Client Experienced Management Programme as specified in the bid document at a total amount of.

**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.]*

**The bidder must provide the following information:**

**Table (a) Details of the bidder's current and past experience in client experience management within the Development Finance Institution (DFI) and/or financial institutions and/or banking environment (please refer to par 7.1.1 of Section 2 of this RFP document):**

**7.1.1**

<b>Client' Name</b>	<b>Project description</b>	<b>Number of Client satisfaction surveys responses</b>	<b>Project period</b>	<b>Description of service performed and extent of Bidder's responsibilities</b>	<b>Name, title and telephone contact of client</b>



**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**

<b>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:</b>	
<b>Supplier Number</b>	
<b>Unique registration reference number</b>	

**BIDDING STRUCTURE**

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

**REQUIRED INFORMATION**

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

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

Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	
Scope of work and the value as a % of the total value of the contract	

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

## ANNEXURE 3: TAX COMPLIANCE REQUIREMENTS

1. TAX COMPLIANCE REQUIREMENTS		
<p>1.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>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.</p> <p>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.</p> <p>1.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.</p> <p>1.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.</p> <p>1.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>		
2. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS		
<p>2.1 IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>2.2 DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>2.3 DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>2.4 DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p><b>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.</b></p>		
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	

## 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 <sup>1</sup> 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

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;

\_\_\_\_\_

<sup>1</sup> 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.

- 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 consortium<sup>2</sup> 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

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<sup>2</sup> 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.

<b>Documents necessary to verify the Identity of a Trust</b>	<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
<b>Total Black Shareholding % as per the current and valid B-BBEE Certificate</b>				

**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**

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

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<b>Request for Proposal No:</b>	
<b>Name of Bidder:</b>	
<b>Authorised signatory:</b>	

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><b>Accountability</b></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><b>Processing Limitation</b></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><b>Purpose Specification</b></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><b>Further Processing Limitation</b></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><b>Information Quality</b></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><b>Open Communication</b></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"/>
7.	<p><b>Security Safeguards</b></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><b>Data Subject Participation</b></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: \_\_\_\_\_

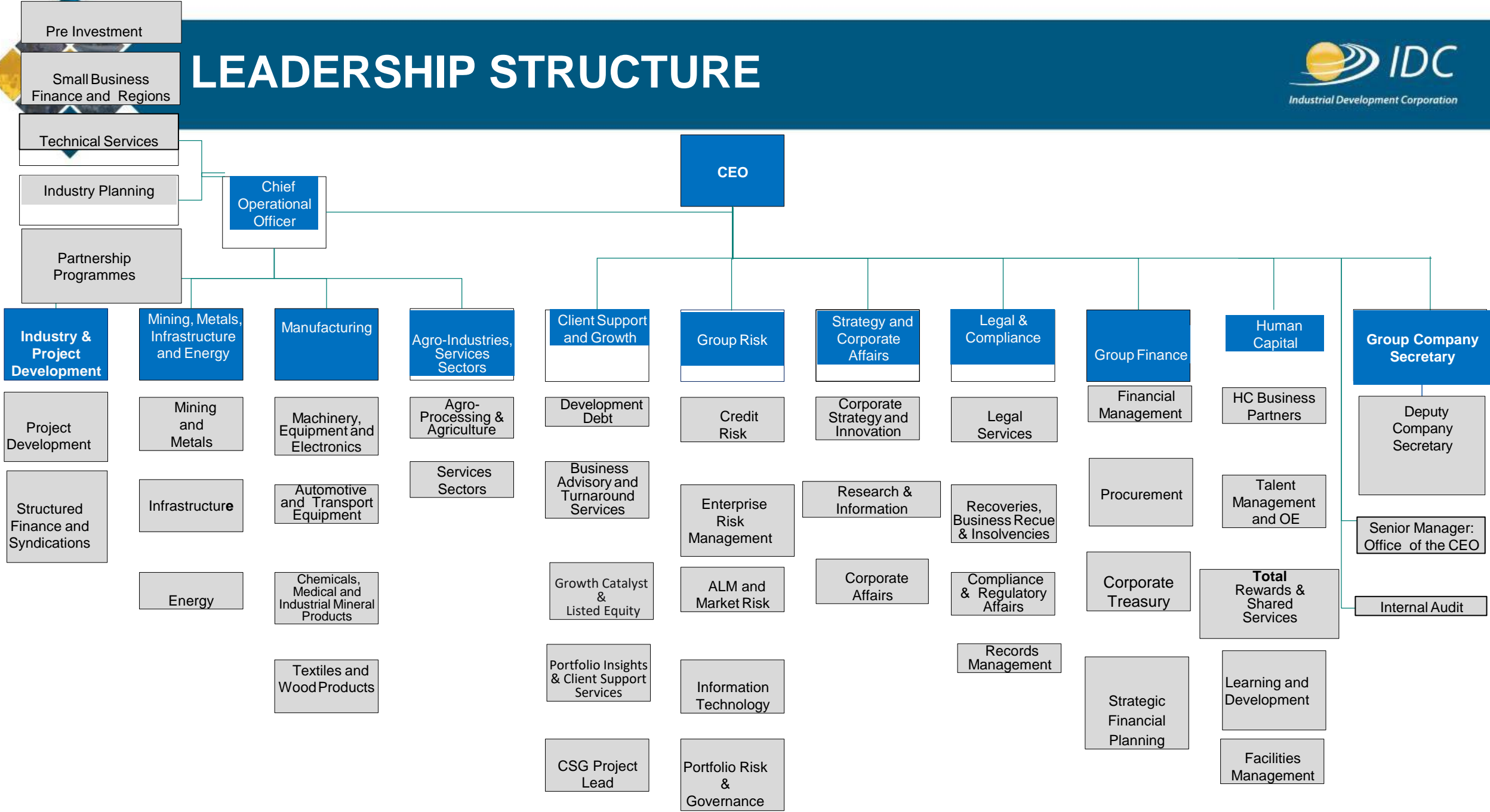
\_\_\_\_\_  
Signature (Company/ Entity Representative)

\_\_\_\_\_  
Date

## **ANNEXURE 9: IDC ORG STRUCTURE AND IDC CORPORATE PROFILE**

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# LEADERSHIP STRUCTURE



**Partnering you.  
Growing the economy.  
Developing Africa.**



# Corporate *Profile*

*The primary driving force of commercially sustainable  
industrial development and innovation in  
South Africa and the rest of Africa.*



## **About us**

Since 1940, the Industrial Development Corporation (IDC), South Africa's largest development finance institution, has helped to build the industrial capacity that fuels the country's economic growth by funding viable businesses. South Africa's prosperity is inextricably linked to the economic development of the rest of Africa, which offers enormous market potential and as yet untapped resources. As the government's key partner in revitalising the economy, the IDC focuses on priority economic sectors that offer the greatest potential to unlock job opportunities.

## **Our vision**

To be the primary driving force of commercially sustainable industrial development and innovation to the benefit of South Africa and the rest of the African continent.

## **Our mission**

The Industrial Development Corporation is a national development institution whose primary objectives are to contribute to the generation of balanced, sustainable economic growth in Africa and to the economic empowerment of the South African population, thereby promoting the economic prosperity of all citizens. The IDC achieves this by promoting entrepreneurship through the building of competitive industries and enterprises based on sound business principles.

## **What we do**

Through partnership, the IDC provides funding in support of industrial capacity development.

## **We do this by:**

- Proactively identifying and funding high-impact projects
- Leading the creation of viable new industries
- Using our diverse industry expertise to drive growth in priority sectors
- Taking up higher-risk funding in early-stage and high-impact projects

## **The primary outcome of the IDC's activities:**

- To facilitate the creation of sustainable direct and indirect jobs

## **Additional outcomes include:**

- Regional equity
- Expansionary BEE
- Grow the SME sector with linkages to priority sectors
- Grow sectoral diversity and increase localisation
- Environmentally sustainable growth

## **Additional services**

IDC's business support programme offers non-financial support to entrepreneurs. The support is available during pre and post approval stages, including assistance to distressed clients.

## ***What we offer you:***

***The IDC offers funding across its mandated sectors under the following Strategic Business Units (SBU):***

***Basic Metals and Mining SBU*** offers finance for mining-related enterprises. This ranges from emerging mining houses to jewellery manufacturing, with a focus on operations that have a significant developmental component.

***Automotive, Transport and Equipment SBU*** provides industry and project development support to ferrous and non-ferrous metal-based manufacturing businesses. Sub-sectors supported by the unit include fabricated metal, capital and transport equipment; automotive assembly, including medium and heavy commercial vehicles, buses and taxis, and components; advanced manufacturing; and renewable and energy-saving industry components.

***Machinery, Equipment and Electronics SBU*** focuses on supporting industrial activities in the manufacturing of machinery and capital equipment, combined with innovations in electronics and robotics. The SBU aims to leverage the strength of pre-existing investments and relationships while allowing for alignment to the future of Machinery and Equipment for the 4IR industry.

***Chemicals, Medical and Industrial Mineral Products SBU*** supports entrepreneurship, promotes industrial development and strategic partnerships by building competitive industries and enterprises in South Africa and the rest of Africa.

***Textiles and Wood Products SBU*** supports a variety of enterprises across the industry, ranging from the production of natural or synthetic fabrics, to creating home décor, from leather goods to clothing manufacturing. The unit's more specific focus is on synthetic fibre production, spinning yarn, knitting, and weaving fabrics, dyeing, printing, and finishing fabrics, non-woven textiles, home textiles, clothing manufacturing, footwear, leather tanning and leather products.

***Agro-processing and Agriculture SBU*** invests in the development of projects and businesses that either create new or expand local manufacturing capacity – which often results in the creation of new jobs as well as replacing imports, facilitating increased exports, and enhancing competitiveness. This is done by, amongst other things, reducing production costs by introducing new technologies, increasing efficiencies, and promoting a value chain approach.

**Energy SBU's** role amongst others is to facilitate South Africa's energy transition and ensuring sustainable energy security in South Africa and the rest of the continent. South Africa's energy sector is currently undergoing several impactful transformations, moving from traditional fossil fuel power sources to lower carbon environmentally sustainable technologies and business models such as Renewable Energy (e.g. Solar PV, Wind, Biomass and Hydropower), Energy Storage Technologies, Green Hydrogen, Distributed Generation, Mini and Micro Grids, Energy Efficiency and Management among others.

**Infrastructure SBU** enables infrastructure enterprises to pursue growth opportunities in water and sanitation, telecommunications, logistics, and transport. The unit offers funding instruments that include debt, equity, and guarantees tailored to clients' businesses and project-specific needs. The structuring thereof and the funding terms are dependent on the business plans.

**Tourism and Services SBU** invests in the accommodation sub-sector, particularly driving investment into the underserved areas. It further supports niche tourism categories such as adventure and business tourism.

**Media and Audio Visual SBU** supports the production of local feature films, television shows, and documentaries. The unit further supports the development of digital cinemas in townships and rural areas that for long have lacked such facilities.

**Rest of Africa** is responsible for business development activities such as marketing IDC products, identifying suitable financing and investment opportunities throughout the rest of the African continent, and managing relationships with clients and stakeholders on the continent. The IDC brings a wealth of experience both locally and across borders to industrial transformation in Africa, supporting sustainable development on the continent.

## **What funding products do we have available?**

The IDC funds start-up and existing businesses with a minimum funding requirement of R1 million and a maximum of R1 billion.

**Funding can be structured utilising a wide array of instruments including:**

- Debt/equity
- Quasi-equity
- Guarantees
- Trade finance
- Bridging finance
- Venture capital

**The funding will be structured in the most appropriate manner to meet the business needs, and structuring options include:**

- Funding term: short-, medium- and long-term loans are available
- Payment holidays: this can be negotiated where applicable, allowing for periods where no payments need to be made on either capital or interest

### ***In addition, several special schemes are available including:***

- The Gro-e-Scheme that funds businesses with a high job creation potential at an interest rate of prime less 3%
- The UIF Fund that funds businesses with a high job creation potential at a fixed interest rate of 6%
- Transformation and Entrepreneurial Development (TES) that aims to assist entrepreneurs from marginalised groups to access the formal economy; Distressed Funding schemes that aim to save jobs by assisting companies across various sectors that have been affected by adverse conditions such as the recent economic downturn, the strong SA currency and natural disasters (e.g. floods, drought and fire)
- Sector-specific schemes (horticulture, forestry, clothing and textiles, hospitals)

### ***Minimum requirements***

- Security, the form and nature of which will relate to your specific circumstances
- Compliance with international environmental standards
- Shareholders/owners are expected to make some financial contribution:
  - The contribution of historically disadvantaged people under special circumstances may be lowered, in which case the IDC will be prepared to extend finance in excess of the owner's contribution
- The project/business must exhibit economic merit in terms of profitability and sustainability
- The IDC does not refinance fixed assets, since our aim is to expand the industrial base

## ***For IDC funding, the following will apply:***

- The purchaser must be a historically disadvantaged person or majority black-owned business
- At least 50% of the total IDC funding required is to be reinvested into the company for growth and expansion and additional jobs must be created. Pure acquisitions may be considered for qualifying businesses e.g. Black Industrialist
- The purchase price for the business or assets needs to be to the satisfaction of the IDC as determined by a fair valuation methodology
- The purchase price may be paid to the seller over a period of two to three years, subject to pre-determined targets of profitability being achieved

**DISCLAIMER:** Applicant(s) should use their own preferred sources of information to compile business plans, based on the nature of their businesses. The above-mentioned information constitutes a summary of our general guidelines, not an exhaustive list of requirements. Submission of an application in line with the guidelines does not guarantee that the IDC will approve a funding application. The Business Plan Guidelines document is neither an agreement nor an offer. It is to provide the Applicant(s) with information to assist the Applicant(s) to formulate its business plan. These guidelines do not claim to contain all the information each Applicant may require. Each Applicant should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in the Business Plan Guidelines document and where necessary obtain independent advice. The IDC makes no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of this Business Plan Guidelines. The IDC may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this Business Plan Guidelines and without notice.

The Applicant(s) hereby consents to the IDC providing the information submitted pursuant to a funding application to a third party in adherence to the Promotion of Access to Information Act ("PAIA") and other legislation should it be required to so disclose.

The Business Plan Guidelines must be read in conjunction with the mandatory information and documentation to be made available to the Applicant(s) by the IDC following receipt of the Application.

***See the Business Plan Guidelines for a comprehensive list of requirements***

# Contact us

The Industrial Development Corporation has offices in all nine provinces of South Africa.  
For more information, please contact:

## Head Office:

### **Gauteng - Johannesburg (Sandton):**

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Tel: 011 269 3000 | E-mail: [gp@idc.co.za](mailto:gp@idc.co.za) | [www.idc.co.za](http://www.idc.co.za)

### **Free State - Bloemfontein:**

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Tel: 051 411 1450 | Email: [fs@idc.co.za](mailto:fs@idc.co.za)

### **Limpopo - Polokwane:**

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### **North West - Rustenburg:**

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Postnet Suite 290, Private Bag X 82245, Rustenburg, 0030  
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### **Brits:**

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Tel: 012 252 0008

### **Mahikeng:**

1B Mikro Plaza, cnr First Street / Bessemer Street, Industrial  
Sites Mafikeng  
Postnet Suite 89, Private Bag X2230, Mafikeng South, 2791  
Tel: 018 397 9942 | email: [mahikeng@idc.co.za](mailto:mahikeng@idc.co.za)

### **Northern Cape - Kimberley:**

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### **Upington:**

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Louisvale Avenue, Upington, 8800  
Tel: 054 337 8600

### **Western Cape - Cape Town:**

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Cape Town  
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Tel: 021 421 4794 | Email: [wc@idc.co.za](mailto:wc@idc.co.za)

### **Kwa Zulu Natal Durban:**

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Lembede Str., Durban  
PO Box 2411, Durban, 4000  
Tel: 031 337 4455 | Email: [kzn@idc.co.za](mailto:kzn@idc.co.za)

### **Eastern Cape (East) - East London:**

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Berea, East London  
PO Box 19048, Tecoma, 5214  
Tel: 043 721 0733/4777 | Email: [ecEast@idc.co.za](mailto:ecEast@idc.co.za)

### **Mthatha:**

Seda offices, 7 Sprigg Street, Mthatha

### **Eastern Cape (West) - Port Elizabeth:**

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Newton Park, PE  
PO Box 27848, Greenacres, Port Elizabeth, 6057  
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### **Mpumalanga - Nelspruit:**

Maxsa Building, 15 Ferreira Street, Suite 702,  
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### **eMalahleni (Witbank):**

Rm 304, Smokey Mountain Office Village, Route N4 Business  
Park, Ben Fleur X11, Witbank  
Tel: 013 658 2960/1

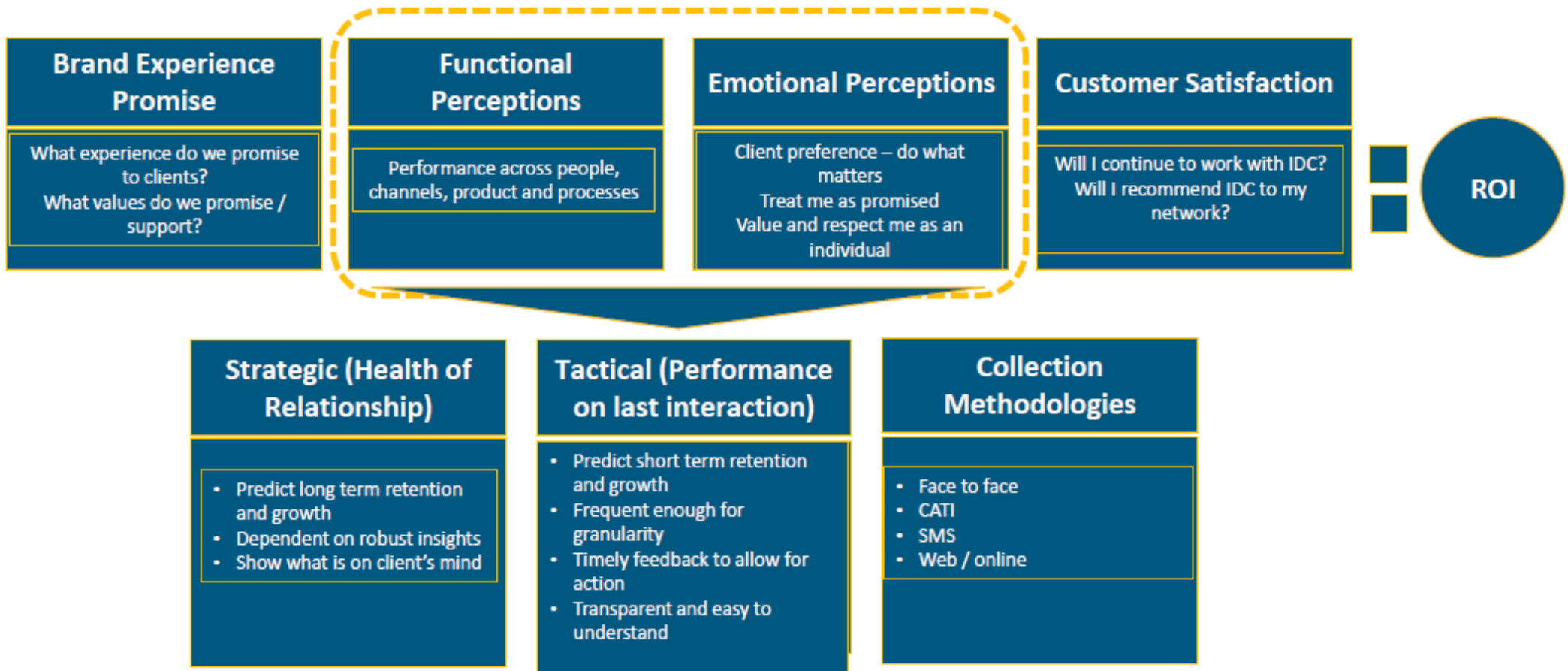
## **ANNEXURE 10: CLIENT EXPERIENCE FRAMEWORK**

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# IDC Client Experience Framework



# Client Experience Framework





# Client Experience Framework (cont..)

