

**T02/02/25**

**THE APPOINTMENT OF ADDITIONAL  
PANELLISTS FOR THE IDC CAPABILITY  
ADVISORY SERVICES PANEL  
(Existing Panellists need not re-apply)**

**BID CLOSING DATE:  
20 FEBRUARY 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: Mr Ivan Nkwana

Telephone Number: +27 11 269 3338

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

2.2. Enquiries in relation to this RFP will not be entertained after **16h00 on 13 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 **20 February 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 still 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. Other Functional/ 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:

ELEMENT	WEIGHT
BIDDER'S RELEVANT EXPERIENCE	40
QUALIFICATIONS, EXPERIENCE AND SKILLS OF THE PROJECT LEAD	25
QUALIFICATIONS, EXPERIENCE AND SKILLS OF THE PROJECT TEAM	20
TRANSFER OF SKILLS TO CLIENT'S MANAGEMENT & STAFF	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	<b>80</b>
Specific Goals <sup>1</sup>	<b>20</b>
<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, and between 51% - 99.99% black owned entities will score 4 points.

<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**

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- 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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IDC is a self-financing state-owned national development finance institution that provides financing to entrepreneurs and businesses engaged in competitive industries. Its 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. It achieves this by promoting entrepreneurship through the building of competitive industries and enterprises based on sound business principles.

IDC’s Business Advisory & Turnaround Services Department (BATS) provides business support services to existing IDC clients (called: Business Partners or “BPs”) through the Capability Advisory Services (CAS) unit and are seeking to add to the existing panel of Capability Advisory Services. CAS focuses predominantly on small and medium sized enterprises (SMEs) in their early stage, growth, maturity, or in their early stage of stress. The aim of CAS is to achieve the long-term viability and sustainability of IDC-funded businesses.

CAS engages outsourced service providers to render relevant implementation of proposed solutions as envisaged in each BPs ToR. The consultancy costs are generally shared between the IDC and its business partners (or investee clients).

CAS provides technical assistance to its clients in the form of management consulting, digital transformation, mentoring. Various Strategic Business Units (SBUs) and Departments within IDC would request business support services from CAS on behalf of BPs. The CAS team diagnoses each BP assistance request to inform the intervention programme on which solutions can be executed fully by the CAS Specialists and engages outsourced service providers to provide and implement the required services if those capabilities cannot be executed internally by CAS Specialists.

Hereunder is the process that the CAS unit follows leading to the engagement of the appointed panellists:

- CAS receives a request from the SBU/department.
- CAS screens the request to ensure mandate fit.

- CAS conducts business diagnosis to determine business support needs, intervention objectives, estimated costs and timeframe for the intervention. These issues are included in the Terms of Reference (ToR) for each intervention.
- The client representatives, a CAS specialist and SBU/department representative all sign the ToR to indicate agreement on the content of the ToR.
- Business support funding approval is requested from the relevant IDC funding authority.
- CAS identifies and shortlist the appropriate service provider(s) on the panel of service providers for a possible engagement with the BP.
- CAS contacts the service provider well suited to implement the proposed engagement milestone(s) and, if available for engagement, the panellist is to provide an Implementation Plan for the intervention, which must be acceptable to the BP and IDC.
- CAS issues a Letter of Engagement (LoE) to the service provider(s) to be signed-off before engaging with the client.

Service provider(s) implements the intervention solution(s) and submits reports, timesheets, and invoices on a regular basis as per the ToR and/or the Letter of Engagement. The CAS Specialist provides ongoing monitoring of the performance of the service provider(s) to ensure compliance with the ToR. The service provider(s) submits an exit report on completion of the intervention.

## **2.1. Engagements and Demands**

Engagement with a client range from as little as a few days to an average of about 60-man days. There is usually an initial stage where the bulk of hours are used in analysis, design, and implementation of a solution, with a tail-end of monitoring that could go on for up to two years afterwards.

## **2.2. Instances where Business Support is provided**

The need for business support is determined either when IDC receives applications from entrepreneurs to finance their existing/future businesses or in the normal course of monitoring existing IDC clients. In cases where the entrepreneurs and managers in those enterprises have limited business management skills and experience or face management challenges then capability advisory intervention would be required.

This usually happens with small and medium-sized enterprises (SMEs) where entrepreneurs and managers, together with their staff (and in some cases members of the board of directors) may require support and training to improve their management abilities to run their businesses successfully. Business support could be provided in areas such as general management, marketing and sales, production, finance and accounting, human resources and organizational development, policy development, corporate governance, strategy, and business planning, etc.

## **2.3. Below are some examples of the types of clients that would require business support:**

### **2.3.1. Business Partners in the start-up phase**

- Clients that need assistance and guidance to commence business.
- Clients needing assistance in dealing with teething problems.
- Clients involved in acquisition of going concerns and require assistance with transition into the new management regime.
- Clients with limited management experience who require support.
- Clients requiring assistance with the establishment of processes, systems, and controls in various functions in their businesses.
- Clients requiring support in financial management and reporting.
- Assistance to comply with corporate obligations and sectoral compliance (e.g., tax, environmental, health and safety, corporate governance, skills development, Contagious Diseases Risk Management plan, etc.)

#### 2.3.2. **Business Partners in the growth phase**

- Clients requiring assistance with industry and market research. (Like pre-investment work)
- Clients requiring assistance with product development.
- Clients expanding their operations.
- Clients requiring assistance with the analysis and improvement of processes, systems, and controls in various functions of their businesses.
- Clients requiring support in financial management and reporting.
- Clients requiring assistance in improving sales performance and improve brand equity.

#### 2.3.3. **Business Partners in the maturity phase**

- Clients requiring support to consolidate their operations.
- Clients requiring putting the business on a new growth path.
- Clients requiring support to diversify product or service offerings.

### 2.4. **Use of External Service providers**

Before an external service provider (“ESP”) is engaged with a BP, terms of reference (“ToR”) are documented to outline the nature of consulting work to be performed, the issues to be addressed and desired outcome, the time frame and budget. A suitable service provider is selected from the panel that best matches the following criteria:

- Skills, knowledge, and experience relevant to the BP’s business and industry/sector.
- Consulting expertise appropriate for task at hand.
- Proximity to the client, and/or willingness to travel to client’s business premises.
- Availability when required.
- Competitive consulting rates.

## 2.5. Types of Service Providers Required

The IDC requires service providers with certain types of skills, knowledge, experience, and expertise that would be used to provide business support assistance to its BPs, with the following categories:

- Business Leadership, Corporate Governance Training & Mentoring
- Specialised Services, e.g., Regulatory Industry Compliance, Technical Assessments and Digital Transformations

2.6. Below is a brief explanation of the above service provider groupings:

### 2.6.1. Service providers with industry/sector or sub-sector expertise (Industry/Sector Experts)

These are service providers with industry/sector or sub-sector specific expertise. They will be required to provide expert consulting services in specific industries, sectors, or subsectors, which would be in line with IDC's mandate and strategic business units (SBUs).

### 2.6.2. Service providers with expertise in specific functions (Functional Management Areas)

CAS may need to engage service providers with expertise in the following functions/activities:

- ✚ Operations, Finance, Procurement & HR Policy development
- ✚ Process development, process mapping and workflows
- ✚ Strategy (Development and Implementation and Business Design)
- ✚ Operations Excellence and Cost Optimisation
- ✚ Business Process Reengineering and Optimisation
- ✚ People & Organisational Performance
- ✚ Change Management
- ✚ Cost and management accounting including standardised reports, dashboard reporting, budgeting, and forecasting
- ✚ Operational finance modelling optimisation
- ✚ Internal auditing and internal controls improvements
- ✚ External auditing consulting opinions
- ✚ Marketing Activations and Advertising Consulting (e.g., Campaign Management, Content Creation, Graphic Design, Paid Media Marketing)
- ✚ Market Development, Research & Analytics
- ✚ Consumer and Customer Surveys

### 2.6.3. Service providers with Specialised Services and Digital Transformation

- ✚ Quality certification or accreditation e.g., SANS, SABS, HACCP, ISOs
- ✚ Environmental Impact Assessment (EIA)
- ✚ Environmental, Health and Safety (EHS) assessment, policies, and procedures



- ✚ Technical assessments, e.g., Geotech investigations, Geotech operational support, Geotech Numerical modelling
- ✚ Equipment effectiveness and Productivity improvement including OEE implementations
- ✚ Business Transformation Programme
- ✚ Digital transformation strategy and Implementation
- ✚ Data Analytics, Business Intelligence, Dashboarding and Measurement
- ✚ Technological tools and software solutions.
- ✚ Implementation of various business applications accompanied by relevant accreditations (e.g., Oracle, SAP, Sage, Salesforce, Microsoft D365 & Microsoft SQL etc.)
- ✚ Websites, App and dashboards solutions development and improvements
- ✚ Digital marketing

#### 2.6.4. **Business Leadership and Corporate Governance**

This focuses on equipping business leaders including senior managers and the organisations they lead to unleash sustained performance. As such CAS is looking at service providers who possess or specialising in the delivery of:

- ✚ Good corporate governance practices, structures & organisational design.
- ✚ Empower BP leaders and managers to gain finance and accounting literacy and understanding of management accounts and financial reports.
- ✚ Train BP leads to maximise their effectiveness in an environment of increasing uncertainty and complexity.

#### 2.7. **General Minimum Requirements for Service providers**

The service provider must possess the following attributes:

- To plan, analyse, implement, and monitor business support interventions.
- To monitor client's activities and help the BP correct failures or introduce improvements in the business.
- To demonstrate the financial impact of any decision made in a business.
- Intervention reports on progress achieved.
- Account for one's consulting activities and accurately prepare timesheets and invoices for work done.
- Conduct interviews and interact with BPs at all levels in an organization.
- To communicate verbally and in writing in the relevant official language.
- Transference of skills and knowledge to BPs.
- To guide, counsel, advice, and mentor BPs.
- Make actionable recommendations to the BP in an effective manner.
- Development and maintenance of good working relationships with BPs.
- To patiently engage with low-skilled and semi-skilled employees.
- Willingness to consult with businesses based in rural areas as well as an understanding of cultural dynamics in those areas.

#### 2.8. **Specific objective of the tender**

The IDC has presence in all the domestic regions and would like to promote broad based transformation and development of small and medium entities which provide the required

services across different sectors; and as such will appoint bidders in the following categories. For this reason, bidders must specify their service category expertise and region/s of their presence.

Bidders must indicate, in the tables below, with a **tick (✓)** their service category /expertise and regional presence (multiple ticks are permissible):

No.	FUNCTIONAL AREAS	REGIONAL PRESENCE								
		EC	FS	GP	KZN	LP	MP	NC	NW	WC
1	Mentors									
2	Business Coaches									
3	Interim Managers									
4	Lender Technical Advisors									
5	Information and Communications Technology Consultants									
6	Sales									
7	Marketing									
8	Productivity / Process Improvement Consultants									
9	Transaction Advisors/Specialists									

**Below are IDC's functional management areas and Bidders must indicate in which functional areas they have experiences in.**

No.	FUNCTIONAL AREA	tick (✓)
001	Mentors	
002	Business Coaches	
003	Interim Managers	
004	Lender Technical Advisors	
005	Information and Communications Technology Consultants	
006	Sales	
007	Marketing	
008	Productivity / Process Improvement Consultants	
009	Transaction Advisors/Specialists	

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

The appointed bidder should be able to provide the following:

The IDC is seeking to add to the existing panel of preferred panellists to be engaged on an ad hoc basis to render capability advisory services to the IDC's Business Partners in terms of the background provided.

The required services have been categorised into different specialisation and sectors as reflected below, and bidders will be required to render to IDC, on a need basis, the below services:

	SERVICE CATEGORIES	SCOPE OF SERVICES	CREDENTIALS
	<b>MENTORS</b>	<ul style="list-style-type: none"> <li>• Agree on the mentorship objectives with the mentee</li> <li>• Handhold, guide and direct the mentee towards achieving agreed objectives</li> <li>• Provide support and opportunities for development, and help the mentee to address issues and challenges identified</li> <li>• Impart knowledge and skill to help the mentee grow and fulfil his/her potential</li> <li>• Maintain a medium to long-term developmental relationship with the mentee until mentorship objectives are achieved</li> <li>• Provide support to achieve clear personal and professional goals</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum of 10+ years of experience in the mentoring or related fields.</li> <li>• Qualified and certified business mentors</li> <li>• Extensive knowledge experience at executive management level</li> <li>• Agree on the mentorship objectives with the mentee</li> <li>• Handhold, guide and direct the mentee towards achieving agreed objectives</li> <li>• Provide support and opportunities for development, and help the mentee to address issues and challenges identified</li> <li>• Impart knowledge and skill to help the mentee grow and fulfil his/her potential</li> <li>• Bring in coaches on an ad-hoc basis to impart knowledge and skills to the mentee within specific disciplines</li> <li>• Maintain a medium to long-term developmental relationship with the mentee until mentorship objectives are achieved</li> </ul>
	<b>BUSINESS COACHES</b>	<ul style="list-style-type: none"> <li>• Impart knowledge and skills to the mentee within specific disciplines of Strategy, Leadership &amp; Management, Sales and Marketing, Finance, People, ICT, etc.</li> <li>• Ability to assess business partners' strengths and weaknesses and guide development</li> <li>• Through professional business coaching, help the management team to enhance specific functions of management to grow and professionalize the business</li> <li>• Guide managers/leaders to complete specific business growth tasks within their</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum of 10+ years of experience in business coaching or related fields</li> <li>• Qualified and certified business coaches</li> <li>• Extensive and experience in upskilling people in functional areas of management</li> <li>• Ability to educate and communicate effectively</li> <li>• Proven experience as a coach, preferably in a professional or corporate setting</li> <li>• Strong understanding of coaching methodologies and best practices</li> <li>• Excellent communication and interpersonal skills, with the ability to build rapport</li> <li>• Demonstrated ability to inspire and motivate individuals and teams</li> </ul>

	SERVICE CATEGORIES	SCOPE OF SERVICES	CREDENTIALS
		<p>functional areas</p> <ul style="list-style-type: none"> <li>Identify areas for skills development and provide guidance, resources or training opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Strong analytical skills to assess performance and develop improvement strategies</li> <li>Certification in coaching or a related field is preferred</li> <li>Ability to work flexibly and adapt coaching styles to meet diverse client needs</li> </ul>
	<p><b>INTERIM MANAGERS</b></p>	<ul style="list-style-type: none"> <li>Assume leadership / management role on an interim basis to stabilize, lead and transform the business or a business function.</li> <li>Manage change, transition and handover to permanent leadership within the identified business or business function.</li> <li>Problem-solve and lead a business or business function during a period of crisis and/or uncertainty.</li> </ul>	<ul style="list-style-type: none"> <li>A Senior Executive with extensive experience in leading/managing a business or business division</li> <li>A proven track record of work done in a similar setting</li> <li>Excellent communication skills, both verbal and written, to convey complex information clearly and effectively</li> <li>Demonstrated ability to engage and influence stakeholders at all levels of the organization</li> <li>Analytical mindset with strong problem-solving skills and attention to detail</li> </ul>
	<p><b>LENDER TECHNICAL ADVISORS</b></p>	<ul style="list-style-type: none"> <li>Provide expert guidance on lending policies and regulatory compliance to lending institutions.</li> <li>Analyse current lending practices and recommend improvements for enhanced efficiency and effectiveness.</li> <li>Engage with stakeholders to identify technical challenges and develop tailored solutions to address them.</li> <li>Facilitate training sessions for staff to ensure awareness and understanding of lending processes and compliance requirements.</li> <li>Develop and maintain comprehensive documentation, including policy manuals and procedure guides, pertaining to lending operations.</li> <li>Collaborate with IT departments to integrate advanced lending technologies and improve system functionalities.</li> <li>Monitor industry trends and changes in regulations to keep lending institutions informed and compliant.</li> </ul>	<ul style="list-style-type: none"> <li>Minimum of 5 years of experience in lending, finance, or a related advisory role.</li> <li>Strong understanding of regulatory frameworks and compliance requirements in the lending industry.</li> <li>Proven experience in process improvement methodologies and practices.</li> <li>Excellent communication skills, both verbal and written, to convey complex information clearly and effectively.</li> <li>Demonstrated ability to engage and influence stakeholders at all levels of the organization.</li> <li>Analytical mindset with strong problem-solving skills and attention to detail.</li> <li>Any specialized qualification will be an added advantage.</li> </ul>

	<b>SERVICE CATEGORIES</b>	<b>SCOPE OF SERVICES</b>	<b>CREDENTIALS</b>
	<b>INFORMATION AND COMMUNICATIONS TECHNOLOGY CONSULTANTS</b>	<ul style="list-style-type: none"> <li>• Evaluate and assess current or required IT and communication systems within the organization.</li> <li>• Recommend, procure and install relevant IT solutions, including Enterprise Resources Planning systems</li> <li>• Conduct training sessions for staff to ensure effective use of communication tools and technologies.</li> <li>• Monitor and analyze the effectiveness of implemented systems and strategies, adjusting as necessary.</li> <li>• Ability to digitally transform an organization</li> <li>• Provide expert advice on best practices in IT and communications technology.</li> <li>• Develop and implement innovative communication strategies to enhance employee engagement.</li> <li>• Research and propose new technologies that can improve operational efficiency and communication.</li> </ul>	<ul style="list-style-type: none"> <li>• Proven experience as an IT consultant or similar role in the telecommunications industry.</li> <li>• Strong understanding of current technologies, tools, and methodologies in information technology.</li> <li>• Excellent communication and interpersonal skills, with the ability to convey complex concepts clearly.</li> <li>• Experience in project management and the ability to handle multiple projects concurrently.</li> <li>• Analytical mindset with strong problem-solving skills and attention to detail.</li> <li>• Ability to work collaboratively in a team environment and engage with stakeholders at all levels.</li> <li>• Accredited and certified IT systems providers</li> <li>• Accredited and certified IT systems trainers</li> <li>• "Demonstrated expertise in developing and implementing digital transformation projects, including experience with cloud computing, data analytics, AI, and other relevant technologies."</li> </ul>

	SERVICE CATEGORIES	SCOPE OF SERVICES	CREDENTIALS
	<b>SALES</b>	<ul style="list-style-type: none"> <li>• Develop and implement effective sales strategies to achieve and exceed sales targets.</li> <li>• Identify and cultivate relationships with potential clients through networking and outreach efforts.</li> <li>• Conduct in-depth market research to identify trends, competitive offerings, and consumer needs.</li> <li>• Prepare and deliver compelling sales presentations that effectively communicate product benefits and advantages.</li> <li>• Collaborate with the marketing team to generate qualified leads and enhance brand awareness.</li> <li>• Negotiate contracts and terms with clients, ensuring mutually beneficial agreements are reached.</li> <li>• Maintain detailed records of sales activities, client interactions, and pipeline progression using CRM software.</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum of 5+ years of experience in sales or related fields</li> <li>• Proven experience in a sales role, preferably within the industry.</li> <li>• Exceptional communication and interpersonal skills with the ability to build rapport with clients.</li> <li>• Strong analytical skills and the ability to leverage data for decision-making.</li> <li>• Demonstrated ability to develop and execute a strategic sales plan.</li> <li>• Proficiency in using CRM software and Microsoft Office Suite.</li> <li>• Ability to work independently as well as part of a collaborative team environment.</li> </ul>

	SERVICE CATEGORIES	SCOPE OF SERVICES	CREDENTIALS
	<p style="text-align: center;"><b>MARKETING</b></p>	<ul style="list-style-type: none"> <li>• Develop and execute marketing plans and campaigns to promote company products and services.</li> <li>• Conduct market research to identify trends and customer preferences.</li> <li>• Collaborate with sales and product teams to ensure cohesive messaging and branding.</li> <li>• Monitor and analyze campaign performance, providing insights and recommendations for improvement.</li> <li>• Manage social media platforms, creating engaging content and responding to customer inquiries.</li> <li>• Assist in the creation of marketing materials such as brochures, newsletters, and online content.</li> <li>• Prepare and present reports on marketing performance and market research findings.</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum of 5+ years of experience in marketing or related fields.</li> <li>• Strong understanding of digital marketing strategies and tools.</li> <li>• Proficiency in using social media platforms for marketing purposes.</li> <li>• Excellent written and verbal communication skills.</li> <li>• Analytical mindset with the ability to interpret data and generate insights.</li> </ul>

	SERVICE CATEGORIES	SCOPE OF SERVICES	CREDENTIALS
	<p align="center"><b>PRODUCTIVITY / PROCESS IMPROVEMENT CONSULTANT</b></p>	<ul style="list-style-type: none"> <li>• (Lean, Six Sigma, Kaizen, 5S)</li> <li>• Conduct thorough assessments of current processes to identify areas for improvement.</li> <li>• Develop and implement tailored productivity enhancement strategies for clients.</li> <li>• Facilitate workshops and training sessions to educate clients on process improvement methodologies.</li> <li>• Collaborate with cross-functional teams to gather insights and implement best practices.</li> <li>• Analyze key performance indicators (KPIs) to measure the impact of implemented changes.</li> <li>• Assist clients in adopting lean principles such as Six Sigma, Kaizen, and 5S and tools to maximize operational efficiency.</li> <li>• Provide ongoing support and guidance to ensure the sustainability of improvements.</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to implement / review processes that are in place to ensure operational efficiencies are achieved / monitored /improved across the operation</li> <li>• Ensures there are always improvement projects going on in the company (e.g. linear production process, 5S &amp; Kaizen (housekeeping, standardisation of waste etc) methods - productivity improvement processes)</li> <li>• Excellent written and verbal communication skills.</li> <li>• Proven record of having implemented lean sigma principles.</li> </ul>

### Transaction Specialist advisory services

To help funding institutions and emerging businesses/miners execute sound and beneficial financial transactions:

- ✓ **Funding Structuring:** Designing innovative funding solutions for project success.
- ✓ **Due Diligence:** Conducting comprehensive assessments of financial, operational, and technical project aspects to ensure sound investment decisions.
- ✓ **Valuation:** Develop sound valuation models to support investment decision making.
- ✓ **Transaction Facilitation:** Acting as a trusted intermediary to build strong partnerships between funders and miners.

#### 1. Investment reviews for funders

Enabling funding institutions to make informed and confident investment decisions, we provide clients with:

- ✓ **Project Feasibility Assessments:** Evaluating the technical, economic, and social sustainability of mining ventures.
- ✓ **Portfolio Optimization:** Advising on balancing portfolios to manage risks and maximize returns in the volatile resource sector.



- ✓ **Operational Audits:** Analysing ongoing projects to identify areas for improvement or course correction.
- ✓ **Post investment reviews:** Conducting post investment reviews for projects investment closeout and learnings.

## **2. Business Improvement Services**

Focused on enhancing operating models and driving long-term value creation, we provide clients with:

- ✓ **Operating Model Design:** Creating lean and efficient frameworks tailored to the size and scope of each client's operations.
- ✓ **Process Optimization:** Streamlining operations to reduce costs and improve outcomes.
- ✓ **Value Unlocking Roadmaps:** Identifying untapped opportunities across the mining value chain and turning them into actionable plans

## **3. Scope of Services**

### TRANSACTION PLANNING PHASE SERVICES

**Transaction Objectives:** Develop and or review realistic transaction objectives aligned with client vision and project/investment potential.

**Risk assessment:** Conduct risk assessment on the planned transaction to identify material risks and inform Due Diligence focus areas.

**Due Diligence:** Create and review risk informed Due Diligence templates to be used by the transaction team.

**DD Findings Review:** Review completeness and materiality of the DD conducted by the transaction team.

**Develop and review mandates:** Based on the risk-based DD, support in the development and review of the transaction mandates across the various commercial and project development areas.

**Preliminary transaction KPIs:**

### TRANSACTION NEGOTIATION PHASE SERVICES

**Mandate based negotiation strategy:** Advice on the development and or review of the negotiation strategy based on the approved mandate positions.

**Negotiations tactics:** Provide background support during negotiations to ensure tactics match up with the overall negotiation strategy and mandates.

**Term Sheet Development and Review:** Development and or review of the term sheet based on the outcomes of the negotiations.

**Execution Risk Assessment:** conduct and or review execution risk assessments to identify material execution risks and controls.

**Binding Agreements:** Support and review commercial agreements and ensure alignment with transaction objectives and material risk controls

**Execution Plan Review:** Review on

### PROJECT EXECUTION PHASE SERVICES

**Overall project execution monitoring:** Review project execution progress in line with the transaction objectives and agreements and advise client on the risk status.

**Rectification plans:** Review proposed rectification plans and advice on adequacy thereof.

**Early Dispute Resolution:** Provide early dispute resolution on the client's behalf (form part of client's dispute resolution mechanism).

**Technical and project management support:** Where required provide support to the project execution team on an ongoing basis to ensure objectives are met (client rep role).

**Investment lifecycle support:** Provide client periodic performance review support during the lifetime of the investment.

### POST INVESTMENT PHASE SERVICES

**Post investment criteria:** Develop and or review the project specific post investment review criteria.

**Conduct post investment review**

**Client report back:** Provide client with a post investment review report including emerging themes and learning areas for consideration in other future projects.

**Organizational/functional learning:** Support the client with Updating of the organizational learning and risk databases to ensure non repeats.

**4. PROJECT TIMELINES**

The appointed service provider(s) will be appointed to the panel for Capability Advisory Services and must be available to start immediately after the award. It must be noted that the additional panelists will be aligned to the existing panel expiration date of 31 May 2028.

**5. TECHNICAL EVALUATION CRITERIA**

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**5.1 Other Technical Requirements**

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

<b>5.1.1. BIDDER'S RELEVANT EXPERIENCE</b>	<b>Comply</b>	<b>Partially comply</b>	<b>Not Comply</b>
<p>The bidders should have a minimum of five (5) years' Sector specific experience and support services to various sectors including Government Institutions with relevance to sectors as outlined in the scope of work.</p> <p>The bidders must, in addition, provide at least three (3) relevant contactable references for each sector where the respondent has provided similar services in the last ten (10) years.</p> <p>The IDC reserves the right to contact these references.</p> <p>Please refer to <b>Table (a) of Annexure 1</b> of this document for the format in which the required information must be provided.</p>			
<b>Substantiate / Comments</b>			

<b>5.1.2. QUALIFICATIONS, EXPERIENCE AND SKILLS OF THE PROJECT LEAD</b>	<b>Comply</b>	<b>Partially comply</b>	<b>Not Comply</b>
<p>The proposed <b>Team Lead(s)</b> should have a minimum of ten (10) years' relevant experience in the Technical Area of Expertise / Specialist Technical Expertise which they are proposing in-line with the sectors as outlined in the scope of work.</p> <p>Bidders must submit, as part of their proposal, the following</p> <ul style="list-style-type: none"> <li>• CVs of the team leader/s which must clearly highlight qualifications, areas of experience/competence relevant to the tasks and objectives of this project as outlined above.</li> </ul> <p><b>Note:</b> These may include Engagement Managers, Principals, Partners, Associate Directors etc.</p> <p>Please refer to <b>Table (b) of Annexure 1</b> of this document for the format in which the required information must be provided.</p>			
<b>Substantiate / Comments</b>			

<b>5.1.3 QUALIFICATIONS, EXPERIENCE AND SKILLS OF THE PROJECT TEAM</b>	<b>Comply</b>	<b>Partially comply</b>	<b>Not Comply</b>
<p>The proposed project team should have a minimum of five (5) years' relevant experience in the Technical Area of Expertise / Specialist Technical Expertise which they are proposing in-line with the sectors as outlined in the scope of work.</p> <p>The bidders must submit, as part of their proposal, the following:</p> <ul style="list-style-type: none"> <li>• The structure and composition of the proposed team, clearly outlining the main disciplines/ specialties of this project and the key personnel responsible for each specialty. Please refer to <b>Table (c) Annexure 1</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the key personnel and the CVs must clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above.</li> </ul> <p><b>Note:</b> These may include, Analysts, Associates, Senior Consultants, etc.</p>			
<b>Substantiate / Comments</b>			

<b>5.1.4. TRANSFER OF SKILLS TO CLIENT'S MANAGEMENT &amp; STAFF</b>	<b>Comply</b>	<b>Partially comply</b>	<b>Not Comply</b>
<p>The bidder must indicate how skills transfer will be handled once appointed for an assignment.</p> <p>The following information must be included as part of this proposal.</p> <ul style="list-style-type: none"> <li>• Bidders must include at least three (3) examples where they had to transfer skills, the challenges they faced if any and the outcome of the intervention.</li> </ul>			
<b>Substantiate / Comments</b>			

## **SECTION 3: COST PROPOSAL**

### SECTION 3: COST PROPOSAL

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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
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**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.	Compl y	Not Comply

**6. COSTING MODEL**

Bidders must complete the Pricing Schedule below which must be submitted as part of this bid response.

No.	Name of Resource/ Expert	Designation	Years of Experience	Hourly Rate (VAT Incl.)
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				

**Note: The IDC reserves the right to negotiate rates with all considered bidders.**

**7. SUMMARY OF THE PROPOSAL**

DESCRIPTION	BIDDER'S PROPOSAL
Number of resources (personnel)	
Project duration (in hours)	
Project duration (in months)	
Commencement Date	

## **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 experience in capability advisory services (please refer to Section 2 par 5.2.1):**

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

**Table (b) Details of the Team Lead: (please refer to 5.1.2. of Section 2 of this RFP document):**

Name	Position	Role / Duties in this Project	Relevant Project Experience
			Project description, Client, Project period

**Table (C) Details of the Project Team: (please refer to 5.1.3. of Section 2 of this RFP document):**

Name	Position	Role / Duties in this Project	Relevant Project Experience
			Project description, Client, Project period

**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:**

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

**BIDDING STRUCTURE**

**Indicate the type of Bidding Structure by marking with an 'X':**

<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	

**If Joint Venture or Consortium, indicate the following for each partner:**

<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	
1.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.	
1.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.	
1.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.	
1.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.	
1.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.	
1.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.	
2. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
2.1 IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.2 DOES THE BIDDER HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.3 DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2.4 DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
<p><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

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### 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

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<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.

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 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

<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"/>

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

I, \_\_\_\_\_ (print name) hereby certify that the information, facts, and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company/ Entity: \_\_\_\_\_

Company/ Entity Registration Number: \_\_\_\_\_

Company/ Entity VAT Registration Number: \_\_\_\_\_

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

\_\_\_\_\_  
Date