



ENVELOPE A – TECHNICAL PROPOSAL

TENDER NO: RFP-ESG-2024

REQUEST FOR PROPOSAL (RFP) PACK

FOR THE DEVELOPMENT OF THE ESG STRATEGY FOR
THE EAST LONDON INDUSTRIAL DEVELOPMENT ZONE SOC LTD

START DATE: 14th June 2024
CLOSING DATE: 05th July 2024

NAME OF TENDERER: _____

TENDERER'S ADDRESS:

CHECKLIST FOR SUBMISSIONS

| ITEM | TICK |
|---|------|
| Supporting Documentation To Be Submitted | |
| CIPC Registration | |
| Proof of Office Location (lease agreement, statement of account from the municipality and/or confirmation of address/clearance from the municipal councilor) | |
| Accredited Valid Original or Certified B-BBEE Certificate or Letter from an Accountant confirming Annual Turnover for EMES - Sworn Affidavit confirming annual turnover and B-BEE management split of company | |
| Company Profile | |
| Three Reference Letters | |
| Completed annexure 2 – Team Leader and Team Members | |
| Completed annexure 3 – Company Experience | |
| Team CV's and copies of qualifications | |
| Compulsory Documentation To Be Submitted | |
| Completed and Signed ELIDZ Procurement Handbook with all relevant supporting documentation (Tax clearance etc.) | |
| CSD Registration Certificate | |
| Valid Tax Clearance Certificate or SARS PIN | |
| JV Participation Documentation (If applicable) | |

Please Note: All the above documents must be submitted with Envelope A - Technical Proposal.

The price schedule and proposed solution costing must be submitted with Envelope B –

RFP PACK CONTENTS

1. **Section A:** General Guidelines
2. **Section B:** Requirements Specification
3. **Section C:** Service Level Agreement
4. **Annexure 1:** Procurement Handbook



SECTION A: General Guidelines

FOR THE DEVELOPMENT OF AN ESG STRATEGY FOR
THE EAST LONDON INDUSTRIAL DEVELOPMENT ZONE SOC LTD

1 EVALUATION CRITERIA AND COMMERCIAL EQUITY GOALS

The East London Industrial Development Zone (ELIDZ) supports national transformation goals and strives to target its procurement to create opportunities for Historically Disadvantaged suppliers and service providers. In awarding this tender, preference will be given to companies with a better rating in terms of contributions towards Broad Based Black Economic Empowerment (BBBEE).

The “tender” will be evaluated in accordance with the ELIDZ Procurement Policy using the 80/20 rule i.e. 80 of evaluation points will be based on price competitiveness and 20 will be based on special goals. The following formula is used:

Calculation of the points for Price:

$$Ps = R \times \left[\frac{Pt - Pmin}{Pmin} \right]$$

Where:

Ps = Points scored for price of tender under consideration

R = Percentage of the price

Pt = Rand value of tender under consideration

Pmin = Rand value of lowest acceptable tender

R must be up to a maximum of 80

Score Breakdown:

Price (R) = 80 points

Specific goals = 20 points

A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender. The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.

Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

Preferential and specific goals shall be as per below may include:

- (a) Historically disadvantaged individuals' companies (51% Black owned)
- (b) Women (51% Black Women Owned) companies.
- (c) Persons with disability
- (d) SMMEs
- (e) Service providers located in Eastern Cape Province

(f) Youth

(g) Any other RDP goal or preference points in favor of historically disadvantaged individuals, may be added
The tender documents shall stipulate—

(a) the applicable preference point system as envisaged in regulations

(b) the specific goal in the invitation to submit the tender for which a point may be awarded, and the number of points that will be awarded to each goal, and proof of the claim for such goal.

Tenderers are required to submit a Valid original or certified B-BBEE Certificate issued by verification agency accredited by SANS for the Generic Suppliers, for QSE's and EME's Sworn Affidavit signed under oath confirm ownership status. Failure to submit a valid B-BBEE certificate and/or sworn affidavit may result in zero points being awarded for preference.

Unincorporated Joint Ventures are required to compile a consolidated verified BBBEE certificate in order to achieve Preferential Points

The following table shall be used to convert the Specific goals criteria into points.

Table: Specific Goals Points Conversion

| Estimated Rand Value inclusive of Vat | Specific Goals and Point allocation |
|---------------------------------------|---|
| Above R1 000 000 up to R50 000 000 | 80 points for price |
| | 10 points - 51% and above Black owned suppliers 5 points - 25% up to 50% Black owned suppliers 0 points below 25% Black owned suppliers |
| | 5 points for Eastern Cape Based suppliers 0 points outside Eastern Cape |
| | 1 point for 51% and above Youth owned suppliers |
| | 1 point for 51% and above Women owned suppliers. |
| | 3 points for SMME's (EME or QSE) |
| | |

Specific Goals returnable Documents

| Evaluation Criteria | Returnable document |
|--------------------------------------|--|
| 51% and above Black owned suppliers | SANAS accredited BBBEE Certificate/Affidavit |
| Eastern Cape Based suppliers | Municipality Bill or Lease agreement of any valid proof of address |
| 51% and above Youth owned suppliers | CSD report |
| 51% and above Women owned suppliers. | CSD report |
| persons with disabilities | BBBEE Certificate/Affidavit/CSD report |

Companies with annual turnover less than R10million (Exempted Micro Enterprises or EME's) are automatically awarded a level 4 contributor status, unless the EME is Black Owned (more than 50% black ownership), in which case the enterprise will have a level 2 contributor status. EME which is 100% black owned qualifies for a level 1 contributor. In awarding the EME status, the ELIDZ shall accept a letter from an accounting firm or SARS confirming a company's turnover as less than R10m as well as a sworn affidavit confirming annual turnover and level of black ownership. B-BBEE certificates issued by non-accredited verification agencies will not be accepted as valid proof of a company's B-BBEE status.

The tender will be awarded to the bid with the highest number of points. A tender may be awarded to a bidder that did not score the highest number of points if reasonable and justifiable grounds exist.

Any contract offered by ELIDZ will be based on the correctness of information submitted by the service providers. Any misrepresentation of facts by a service provider may lead to disqualification. Should such misrepresentation be uncovered after the commencement of the contracted work, the ELIDZ reserves the right to terminate the contract and recover all payments made to that service provider and any costs that may have been incurred in the process.

ELIDZ reserves the right to have the tenderer's Black Economic Empowerment Credentials verified by an independent agency. (Procurement Handbook – Annexure: 1 must be fully completed and supplementary information may be completed by service providers with a turnover of less than R10m and be accompanied by letter from an accounting firm or SARS confirming the company's or sworn affidavit turnover is less than R10m

2 CONDITIONS OF TENDERING

General Conditions

PLEASE NOTE THE FOLLOWING CONDITIONS ARE APPLICABLE TO ALL TENDERS.

- No briefing meeting, tenderers are encouraged to send question by email to zandile@elidz.co.za not later than the **27 June 2024 at 16:00**. Responses will be sent not later than **28 June 2024 at 15:00**. It is the responsibility of the service provider to follow up with the response should there be none by **15:00** on the **28 June 2024**;
- The closing date for this tender is at **12h00** on the **05th July 2024**. All tender documents are to be submitted online at <https://tenderportal.elidz.co.za> before the closing date and time;
- E-mailed, faxed, late, or incomplete proposals will not be considered;
- ELIDZ is not obligated to accept the lowest or any proposal;
- Any expenses incurred by the tenderer in preparing and submitting the proposal will be for the tenderer's account, as the ELIDZ SOC Ltd will not accept any liability in this regard;
- We reserve the right to correct discrepancies and errors as necessary with the consent of the tenderer; however, the value total of the prices shall remain unaltered;
- Proposals which do not comply with the tender conditions, or which are incomplete will, as a general rule, not be considered.
- Tenderers must be registered on CSD database from Treasury.

3 SIGNATURES ON TENDERS

All tenders submitted must be signed by that individual, or by someone on his behalf duly authorized hereto and proof of that authority must be attached. All tenders submitted by a company must be signed by a person duly authorized thereto by a resolution of the Board of Directors, a copy of which resolution, duly certified by the Chairman of the company can be submitted with the tender.

If the tender is submitted by a joint venture of more than one person and/or companies and/or firms it shall be accompanied by:

A certified copy of the original document under which the joint venture was constituted. This document must clearly define the conditions under which the joint venture will function, as well as the duration and participation of the several constituent persons and/or companies and/or firms.

A certificate signed by or on behalf of each participating person and/or company and/or firm authorizing the person who signed the tender to do so.

In instances of a joint venture, each participating person and/or company and/or firm must complete and submit Annexure 1 (Procurement Handbook) with the tender together with all profit-sharing percentage information.

4 AREA OF SERVICE/POINT OF DELIVERY

The delivery of services will be required virtually and at the ELIDZ office, Lower Chester Road, Sunnyside, East London.

5 SPECIAL CONDITIONS APPLICABLE TO THIS CONTRACT

Service Providers must note the following special conditions of contract will apply to this contract:

Modification of any applicable terms of reference of this contract must be mutually agreed between the parties and reduced to writing.

- VAT: Unless otherwise stated all prices will be inclusive of **Value Added Tax**.
- All services provided must comply and be in accordance with pertinent laws and policies of government.

Where the SERVICE PROVIDER has incurred any liability to the CLIENT, whether arising from or under this Agreement or otherwise howsoever arising, the CLIENT may, without notice to the SERVICE PROVIDER set-off the amount of such liability against any liability of the CLIENT to the SERVICE PROVIDER arising from or under this Agreement, whether either such liability is liquidated or unliquidated, present or future, accrued or contingent, unless otherwise agreed to in writing by the CLIENT.

6 COMPANY PROFILE

A brief company profile is required, to assist ELIDZ in assessing your capabilities, capacity, and competitive advantages.

7 INADEQUATE SERVICE LEVELS AND PERFORMANCE

In instances of transgression of a more serious nature, should the ELIDZ during the contract period for any reason regard the Service provider's service levels and performance against this contract as being inadequate or not to the ELIDZ's satisfaction, the details will be reduced to writing, clearly headed "Inadequate performance" and sent to the service provider. In the event that the service provider is unable to remedy the complaints to the ELIDZ's satisfaction within 14 days of such notice of inadequate performance, ELIDZ reserves the right to immediately cancel this contract and recover costs in terms of the Service Agreement. Notice of cancellation shall either be by fax or in writing.

8 SERVICE LEVEL AGREEMENT

The successful tenderer will be required to enter into a written Service level agreement with the ELIDZ which will be based on the draft Agreement set out herein in Section C, which will include Section A and B

and include such terms and conditions as Management may require or prescribe to give effect to in terms of its legal obligations.

9 PRICE BASIS

ELIDZ requires the tender price to remain firm for the validity period of ninety (90) days after the closing date of the tender. The tender price shall be in South African Rand.

Where prices are subject to variation it must be noted that no prices are to be revised or invoiced, without prior mutual agreement and official modification of the contract.

10 PAYMENT TERMS

A maximum payment processing period of thirty (30) days will be enforced. The thirty-day period is effective from the date a complete claim is received. A complete claim requires the following to be processed:

- Original invoices;
- Original covering letter of approval by the consultant where applicable;
- Original covering letter of approval by the relevant ELIDZ official where applicable.
- Statement of accounts

All information relating to the ELIDZ's customers (and potential customers), systems, operating procedures etc. is confidential and to this end, the successful tenderer will be required to enter into a Confidentiality Agreement with the ELIDZ.

11 SUFFICIENCY OF TENDER

The tenderer shall satisfy itself before tendering, as to the correctness and sufficiency of its tender for the project. The tenderer shall ensure that the rates and prices it has stated in the schedules cover all the obligations included in the tender and sufficient for the proper completion of the project.

12 TENDERER'S CONDITION

All tenderers shall be deemed to have waived, renounced and abandoned any terms and conditions printed or written upon any stationery used by the tenderer for the purpose of, or in connection with the submission of this tender.

In the event that the successful Bidder has been awarded the contract with value above R 5 000 000.00 for the same goods/services on a consecutive basis, the successful Bidder will be required to submit a Supplier development plan for SMMEs to be agreed with the ELIDZ.

Where there is no designated sector, ELIDZ may decide to include a specific bidding condition that only locally produced goods or services with a stipulated minimum threshold for local production and content,

will be considered, on condition that such prescript and threshold(s) are in accordance with the specific standards determined by the DTI in consultation with the National Treasury.

13 DISQUALIFICATION

Respondents are advised that should there be any contact with ELIDZ staff and the Adjudication Team which could in any way be seen or deemed to constitute a conflict of interest, bribe or otherwise influence the process and the outcome thereof, will result in immediate disqualification.

It must be stressed that any queries relating to this tender must be in writing and within the period of one week from the date of the briefing session and must be addressed to the Project Manager only. Respondents are not to communicate in any manner or form whatsoever with members of ELIDZ personnel about the RFP until the winning service provider has been selected and such selection has been formally communicated to the public. Any such communications by Respondents with ELIDZ personnel or with persons other than the Project Manager may prejudice a Respondent and may lead to disqualification from consideration for selection. The ELIDZ cannot accept responsibility for the accuracy of any information obtained outside the formal communication process as stipulated.

Any misrepresentation, in particular as it relates to the truthfulness of involvement of HDI's at both ownership level, management and operational level will also result in immediate disqualification.

14 SHERQ COMPLIANCE (IF APPLICABLE)

Before starting work, the successful service providers must produce the following for approval:

1. Project specific Safety, Health & Environmental (SHE) Risk assessments, a. SHE Risk assessments to include activity specific risks, service providers risk to the ELIDZ and the ELIDZ risk to them;
2. SHE plans and safe work procedures must be developed to respond to project specific activities as well as to identified risks: for example (waste management plans, fall protection plans etc.);
3. List of applicable PPE required;
4. Letters of Good standing with workman's compensation where applicable;
5. Applicable legal appointments - as required;
6. List of chemicals and related Material Safety Data Sheets;

All of the above must be included in a SHE file together with:

1. Copy of scope of work;
2. Copy of appointment;
3. PPE issue register;
4. Requisite training / competency certificates where applicable;
5. Medicals as applicable to the nature of the work (for example, there must be medicals for employees who will be working at heights to confirm that they are fit to work at heights);

15 ACCEPTANCE OF TENDER IN WHOLE OR IN PART

The ELIDZ reserves the right to accept the complete tender as submitted by the tenderer or alternatively, to accept only specific “areas of work” (or parts of “areas of work”) of the tender as it sees fit.

Accordingly, tenderers are advised to ensure that all prices submitted against each “area of work” are sufficient to cover the tenderer's entire obligation as defined in these documents, required to provide each specific “area of work”.

16 SUPPORTING DOCUMENTATION TO BE SUBMITTED

| ITEM | TICK |
|---|------|
| CIPC Registration | |
| Proof of Office Location (lease agreement, statement of account from the municipality and/or confirmation of address/clearance from the municipal councilor) | |
| Accredited Valid Original or Certified B-BBEE Certificate or Letter from an Accountant confirming Annual Turnover for EMES - Sworn Affidavit confirming annual turnover and B-BEE management split of company | |
| Company Profile | |
| Three Reference Letters | |
| Completed annexure 2 – Team Leader and Team Members | |
| Completed annexure 3 – Company Experience | |
| Team CV's and copies of qualifications | |

17 COMPULSORY DOCUMENTATION TO BE SUBMITTED

The following documentation is considered as compulsory documentation and is required to be submitted with your tender. Failing to submit the compulsory documentation will lead to disqualification due to non-responsiveness.

| ITEM | TICK |
|---|------|
| Compulsory Documentation To Be Submitted | |
| Completed and Signed ELIDZ Procurement Handbook with all relevant supporting documentation (Tax clearance etc.) | |
| CSD registration certificate | |
| JV Participation Documentation (JV agreement, consolidated BBBEE certificate, if applicable) | |

18 POPIA

By submitting this tender, the bidder hereby consents to providing the ELIDZ with personal information as provided in the Protection of Personal Information Act 2013 (POPIA).

The ELIDZ undertakes to:

1. It will take all reasonable steps and precautions to preserve the integrity of bidders Personal Information and to prevent any corruption or loss of such data.
2. It will not do any of the following: copy, compile, collect, collate, process, store, transfer, alter, delete, interfere with or in any other manner use the bidders Personal Information as described in the Act for any purpose other than with the express prior written consent of the bidder.
3. Utilize the personal information provided for the purposes of assessment of the tender submitted by the bidder and contracting with the successful bidder as the case may be.
4. It will immediately inform the bidder in writing if any Personal Information relating to it has been compromised. The ELIDZ undertakes to immediately inform the bidder in writing as to how it will manage such compromise and what steps will be taken to rectify the situation.
5. Due and reasonable care of the bidder's personal information and not to share the said personal information with any third party unless you have authorised such disclosure or the release of such information is required by law.
6. At all times strictly comply with its obligations under Data Protection Legislation.
7. Subject to legislative, regulatory, contractual and other legitimate conditions, the respective bidder has certain rights in terms of how their information is processed. The bidder can request access to information or guidance on how to lodge a complaint from or direct a request to exercise afforded rights to the ELIDZ Information Officer, or his/her deputy/ies, or the Information Regulator.
8. It will maintain guidelines, policies or procedures for the retention or destruction of data and will retain it only as long as necessary for the identified purposes or to meet legal requirements or policies.
9. Shall implement and maintain, at its cost and expense, appropriate, reasonable technical and Organisational It measures to prevent loss of damage to or unauthorised destruction of Personal Information and unlawful access to or Processing of Personal Information

The ELIDZ shall not incur any liability for costs, loss or damage arising from the use of inaccurate or incomplete data provided by or on behalf of the bidder.

19 METHOD OF SUBMISSION

The RFP document will be available for download at no cost on www.elidz.co.za at **12h00** (Noon) on the **14th June 2024** from the East London Industrial Development Zone website: www.elidz.co.za under

Opportunities >> Tenders All tender documents are to be submitted online at <https://tenderportal.elidz.co.za> on the closing date and time.

No late tenders will be accepted.

Telegraphic, telephonic, telex, facsimile and e-mail tenders will not be accepted.

For the attention of: Zandile Mtebele: Tenders and Supplier Developer zandile@elidz.co.za

The ELIDZ reserves the right:

1. To negotiate with the successful tenderer and/or
2. modify the RFP's goods / service(s) and request Respondents to re-bid on any changes;
3. reject any Proposal which does not conform to instructions and specifications which are detailed herein;
4. disqualify Proposals submitted after the stated submission deadline;
5. disqualify Proposals submitted that do not meet the goods or services specifications;
6. not necessarily accept the lowest priced Proposal;
7. reject all Proposals, if it so decides;
8. place an order in connection with this Proposal at any time after the RFP's closing date;
9. split the award of the order/s between more than one Supplier/Service Provider; or
10. make no award at all or
11. award a portion of the order to a service provider.
12. ELIDZ reserves the right not to award business to the highest scoring bidder/s where objective criteria justify the award to another bidder.
13. The ELIDZ does not bind itself to accept your (or any) proposal, nor will it disclose any information regarded as confidential.



SECTION B: Requirements Specification

FOR THE DEVELOPMENT OF AN ESG STRATEGY FOR
THE EAST LONDON INDUSTRIAL DEVELOPMENT ZONE SOC LTD

Table of Contents

| | |
|---|-----------|
| CHECKLIST FOR SUBMISSIONS | 2 |
| Please Note: All the above documents must be submitted with Envelope A - Technical Proposal. | 2 |
| The price schedule and proposed solution costing must be submitted with Envelope B – Financial Proposal. | 2 |
| 1. Introduction | 18 |
| 1.1. The scope of this RFP includes the following: | 18 |
| 2. Considerations | 18 |
| 2.1. Requirements Considerations | 18 |
| 2.2. Financial Considerations | 19 |
| 2.3. Time Constraints | 19 |
| 2.4. Area of Service and Facilities | 19 |
| 3. Detailed Requirements | 19 |
| 3.1. Scope of work | 19 |
| 4. Response Format | 22 |

1. Introduction

1.1. The scope of this RFP includes the following:

The East London IDZ would like to appoint a suitably qualified and competent service provider for the development of an ESG strategy.

2. Considerations

2.1. Requirements Considerations

The score achieved for quality functionality will be assessed using the following criteria, each of which will be scored individually up to the maximum number of points indicated (failure to submit the relevant information will result in zero score for that section).

FUNCTIONALITY EVALUATION MATRIX

| FUNCTIONALITY TABLE | | |
|--|-----------|---|
| <u>PROJECT TEAM QUALIFICATIONS AND EXPERIENCE</u> | 70 | |
| Qualifications of Team | 10 | Qualifications of the team members |
| Team Leader: has an ESG related certification | 8 | |
| Team Member: has an ESG related certification | 2 | |
| No team members hold an ESG related certification | 0 | |
| Experience Level of Team – ESG | 30 | Team experience in providing ESG related services (Annexure 2 to be completed) |
| Team Leader | 30 | |
| <i>ESG project experience</i> | | |
| Implemented 3 or more ESG Strategy Implementation Projects (each project must have a minimum of 40 hours and at least R500K project budget). | 30 | |
| Implemented 2 ESG Strategy Implementation Projects (each project must have a minimum of 40 hours and at least R500K project budget). | 20 | |
| Implemented 1 ESG Strategy Implementation Project (each project must have a minimum of 40 hours and at least R500K project budget). | 10 | |
| Team leader has no ESG strategy implementation project experience | 0 | |
| Experience Level of Company – Public Sector | 30 | Company experience in completing ESG related projects in the public sector (Annexure 3 to be completed) |
| Company | 30 | |
| <i>Public sector experience</i> | | |
| Company has successfully completed 1 or more ESG related projects at a SEZ entity | 30 | |
| Company has successfully completed 1 or more ESG related projects at a public entity | 20 | |
| Company has successfully completed 1 or more ESG related projects within the public and/or private sector | 10 | |

| | | |
|--|------------|--|
| Company has no ESG related project experience within the public sector | 0 | |
| REFERENCE SCORE | 30 | Annexure 4 completed with three (3) respective referees contact details and stamp. Score out of 5 (0 - for poor services received, 3 – for satisfactory services received, 5 - for good services received) |
| Average Score from minimum of three reference letters | 30 | |
| Total Score | 100 | |

Bidders are required to score 70 or more points in order to pass functionality and move to the next phase.

2.2. Financial Considerations

Payment milestones will be attached to the service level agreement.

2.3. Time Constraints

The East London Industrial Development Zone would like this project to commence on the 1st October 2024 after the signing of the service level agreement.

2.4. Area of Service and Facilities

The delivery of services will be required virtually and at the East London IDZ offices, Lower Chester Road, Sunnyridge, East London. We currently have no branch offices.

3. Detailed Requirements

3.1. Scope of work

a. Specification

The East London IDZ (ELIDZ) would like to appoint a suitable, independent, qualified and experienced service provider for the development of a comprehensive Environmental, Social & Governance Strategy (ESGS) which will comply with the international and national best practice applicable. The strategy will enable the ELIDZ to identify, act on and measure what is mutually good for its profits, its stakeholders (people) and the planet.

The ELIDZ is in the final year of its current 5-year Corporate Strategy. The strategy has been developed using the Theory of Change for Planning in the Public Sector. While the ELIDZ prioritizes compliance with all relevant legislation and code, its social and ethical agenda is driven by more than just compliance, but also by the shared aspiration to do good and to have a positive impact on people and the environment. The strategy therefore requires the organization to respond to Environmental, Social & Governance best practice requirements to ensure the attainment of the strategic objectives for the 5-year cycle. The ELIDZ is also determined to maintain

its existence in a manner that will not compromise people (employees, customers, and the public) and the environment.

b. General Considerations

As a State Owned Company (SOC), the ELIDZ is committed to not only complying with the Companies Act No 71 of 2008 (as amended in 2011) but also applicable voluntary and leading best practice in Corporate Governance as contained in the King IV Report on Corporate Governance for South Africa (King IV Report), the United Nations Sustainable Development Goals 2030 and in alignment to Environmental, Social and Governance (ESG) best practice.

In addition, ESGS development considerations for the generation of long-term value and benefits for all stakeholders must include, but is not limited to:

Environmental Criteria that consider environment related impacts and risks and what the ELIDZ should or should not be doing to reduce or mitigate them. Criteria would include but are not limited to the carbon footprint, waste management, pollution, sustainability efforts that make up the supply chain and Sustainable Development Goals 2030, which are anchored on dealing with the effects of climate change on the globe.

Social Criteria with respect to the ELIDZ social impact generated by relationships with the employees, customers, contractors, suppliers, and its communities. Criteria would include but are not limited to, the extent to which the company encourages workplace safety, wellness / wellbeing and culture, diversity, equity & inclusivity, customer satisfaction, the organisations internal and external relationships, data privacy and Sustainable Development Goals 2030, which are anchored on eradicating poverty and hunger, prioritising health and education and eliminating inequalities.

Governance Criteria details the roles, responsibilities, and expectations to ensure good corporate citizenship, commitment to ethical and responsible leadership and a related ethical leadership culture, to ensure good decisions are made for the ELIDZ, its customers, employees, shareholders, regulators and the community. Criteria would include but are not limited to Board member composition, Board committees, executive credentials, scope & rewards and how the ELIDZ conducts audits and operates ethically.

The service provider must identify and integrate applicable international and national best practice ESG criteria required for the ELIDZ ESGS over and above the guidelines provided above.

Benchmarking is required in developing the ELIDZ ESG Strategy to measure the ELIDZ's ESG performance compared to the focus areas of its peers, its industry leaders, competitors, other industries common areas and attributes, as well as to Global, National, Provincial and local government ESG strategies & best practices. Benchmarking must also be used to inform material topics as part of the materiality assessment.

The **Situational Analysis** must include all relevant attributes of the ELIDZ and the impacts of ELIDZ tenants / investors operations and other relevant activities. These would include but are not limited to a review of the existing:

- ELIDZ Core Values, Strategy, Objectives, Targets, Risks, Corporate Policies and Legal Framework).
- ELIDZ Zones (1A, 1B, 1C, 1D, E, 1F, Fort Jackson & Berlin) tenants and IDZ operational activities and facilities.

- ELIDZ Environmental Management Framework.
- ELIDZ OHS, Quality & Environmental Management Systems.
- ELIDZ Automotive, Aquaculture & Agro Industry, and the Renewable Energy & ICT – sector plans, marketing plans, project pipelines and ESG sustainability linkages with respect to sector plans and project pipelines.
- ELIDZ Green Building Studies.
- ELIDZ Eco-Industrial Park (EIP) Assessment and Pre-Feasibility Report.
- ELIDZ Integrated Waste Management Plan.
- ELIDZ draft Carbon Footprint Analysis.
- ELIDZ Draft Environmental Sustainability Strategy.
- ELIDZ Draft Environmental Sustainability Policy.
- ELIDZ Supply Chain Policies.
- Body of work on the ELIDZ integrated resources plan (IRP that seeks to analyse how renewable energy can feed into the ELIDZ grid and energy mix).
- Stakeholder analysis & management protocols.
- Corporate Communications & Marketing Strategy.
- Human Capital Management Strategy.
- ELIDZ Employment Equity Plan
- ICT Strategy
- Board charter and Board committee terms of reference.

The successful bidder must apply international and national best practice criteria and methodology in executing the situational analysis, in addition to integrating the guideline provided above when conducting the situational analysis.

Strategy Development

Development of the strategy must be aligned to the ELIDZ Corporate Strategy that uses the Theory of Change, including performance matrices that can be used to measure and report on.

Development of the strategy must drive the organisation and its tenants / investors towards the intended ESGS sustainability position.

This strategy must include clear, detailed, recommendations / initiatives and related ESG Goals based on its core business, its value creation model, industry standards and investor and shareholder expectations.

These must be translated into a set of ESG KPIs, aligned to industry best practice that will enable key stakeholders to measure the company's performance with respect to ESG targets, that when implemented, will ensure ESG sustainability of the organisation. The ESGS must include an appropriate value proposition that can be utilized by ELIDZ for investment promotion and retention efforts.

Action Plan

The ESG Strategy must include ESG Programmes for the ELIDZ and its tenants / investors, framed as a comprehensive action plan for proposed ESG sustainability initiatives over an appropriate defined timeline.

Monitoring & Measurement

The ESG strategy, programmes and related KPI's must be supported by the development and establishment of a robust data collection, analysis and reporting system to effectively track and measure ESG performance.

c. Special considerations

The ELIDZ requires a project inception report with a detailed ESG Strategy Development methodology and project plan with timelines to be approved by the ELIDZ.

The envisioned project plan must be included in the proposal and must make provision for update meetings to the project steering committee.

As part of the deliverables to be rendered, the appointed service provider will be required to attend to the following:

- Consultation / interviews with multiple internal stakeholders, including members of the ELIDZ Board and Board Committees, Executive Management, Line Management, functional owners, and where applicable, Investors and Suppliers.
- Meetings: Initiation, fortnightly Steering Committee Management meetings and a close-out report meeting.
- Presentation of the draft ESG Strategy to members of the Executive Management team as directed by the Steering Committee and finalization of the draft strategy thereafter.
- The final ESG Strategy must be transposed to the ELIDZ template that provides for document control requirements.
- In addition to the standard requirements and the guideline provided by the template, the ESG Strategy content must include an executive summary.
- The final draft ESG Strategy must be submitted for approval to the ELIDZ by the 28 February 2025.
- The service provider will be required to enter into a Service Level Agreement (SLA) with the ELIDZ that includes the scope of work and the pricing schedule.
- Upon completion of the ESGS and acceptance thereof by the ELIDZ, the project will be considered closed.

The successful bidder must apply international and national best practice methodology in developing the ELIDZ ESG Strategy. The information provided herein serves to guide on additional considerations over and above the best practice methodology that must be used in developing the ELIDZ ESG Strategy.

PRICE SCHEDULE GUIDE

The pricing schedule will be formalized between the ELIDZ and the successful bidder based on the submitted price and project milestones that will be considerate of the project plan.

4. Response Format

Team profile

Provide the following information:

- Team structure **specifically noting the Team Leader**
- For the Team leader:
 - CV
 - Copies of qualifications
 - Detailed listing of ESG related engagements completed as per annexure 2

Points will be awarded for certifications and qualifications linked to the fundamental elements of ESG and sustainability e.g. certification or qualification linked to Environmental Sciences, Corporate Governance, Climate Change, ESG investing, ESG analysis, ESG reporting frameworks. Points are not awarded for general certifications and qualifications e.g. CA (SA).

Service provider skills competency

- Provide CV's with qualifications, experience and skills of the management team that would be responsible for the project reflecting experience in the public sector on ESG related projects. Curriculum vitae's and certificates must be attached.
- Company profile should be provided and must include completed annexure 3
- **Points will be awarded for the company having implemented the following types of ESG related projects:**
 - **Strategy development: As examples Environmental, Sustainability, Corporate Governance**
 - **Reporting assistance and reviews on ESG strategies**

Assurance engagements related to ESG Points will not be provided for conducting training and SHEQ related projects must show specific link to ESG principles to be accepted

References

- Provide a minimum of (3) three references relevant to this tender, with completed reference letters, stamped, signed and dated by the referee.
- Provide details of the relevant services offered to these references, establishing a track record as well as provide contactable references at these sites \ clients.

Project plan and methodology

- Provide the project plan and methodology to be followed

Please forward any queries to: Zandile Mtebele the following contact details:

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ANNEXURE 1

PROCUREMENT HANDBOOK