



**INDUSTRIAL DEVELOPMENT CORPORATION**

**REQUEST FOR PROPOSAL (RFP) FOR THE APPOINTMENT OF A PANEL OF  
SERVICE PROVIDERS FOR LAND & BUILDINGS VALUATIONS AND PLANT,  
EQUIPMENT & MACHINERY VALUATIONS**

<b>RFP number</b>	<b>T30-06-26</b>
<b>Issue date</b>	<b>05 June 2026</b>
<b>Closing date and time</b>	<b>25 June 2026 at 11h00 AM</b>
<b>Tender validity period</b>	<b>120 days from the closing date and time</b>
<b>Responses to this RFP should ONLY be forwarded to:</b>	<b><a href="https://idcza-my.sharepoint.com/:f:/g/personal/moitlisim_idc_co_za/lqAGrvplrKJZQK4gwh3luiBSARi7fd7pztg2rSV2swwoxfk">https://idcza-my.sharepoint.com/:f:/g/personal/moitlisim_idc_co_za/lqAGrvplrKJZQK4gwh3luiBSARi7fd7pztg2rSV2swwoxfk</a></b>

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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 submitted **in writing** to:

Name: Lunga Mbatha

Telephone Number: Office: 011 269 4376

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

2.2. Enquiries in relation to this RFP will not be entertained after **15 July 2026**.

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 **25 June 2026** not later than **11h00 AM** (before midday). No late bids will be considered. Bids must only be sent to [https://idcza-my.sharepoint.com/:f/g/personal/moitlisim\\_idc\\_co\\_za/IgAGrvplrKJZQK4qgWH3luiBSARi7fd7pztg2rSV2swwoxfk](https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/IgAGrvplrKJZQK4qgWH3luiBSARi7fd7pztg2rSV2swwoxfk). Bids sent to any other platform 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 platform and that this is received by the IDC before the closing date and time in IDC's dedicated platform: [https://idcza-my.sharepoint.com/:f/g/personal/moitlisim\\_idc\\_co\\_za/IgAGrvplrKJZQK4qgWH3luiBSARi7fd7pztg2rSV2swwoxfk](https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/IgAGrvplrKJZQK4qgWH3luiBSARi7fd7pztg2rSV2swwoxfk).

4.4. Bidders are advised to submit / send its bid responses at least **30 minutes** before the **11h00 AM** deadline to avoid any technical challenges in this regard which may result in bid responses being received late. IDC's platform is configured to receive documents 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 platform.

- 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 platform will be considered.
- 4.7. Where a complete bid response (Inclusive of all relevant Schedules) is **not received** by the IDC in its electronic platform [https://idcza-my.sharepoint.com/:f/g/personal/moitlisim\\_idc\\_co\\_za/lqAGrvplrKJZQK4qwH3luiBSARi7fd7pztg2rSV2swwoxfk](https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/lqAGrvplrKJZQK4qwH3luiBSARi7fd7pztg2rSV2swwoxfk) 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 dedicated electronic platform [https://idcza-my.sharepoint.com/:f/g/personal/moitlisim\\_idc\\_co\\_za/lqAGrvplrKJZQK4qwH3luiBSARi7fd7pztg2rSV2swwoxfk](https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/lqAGrvplrKJZQK4qwH3luiBSARi7fd7pztg2rSV2swwoxfk) 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 not hold lower % of the contract value than **any** of the subcontractors.

## 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 SMMs and/ or Youth-Owned businesses. The implications of such arrangement will be subject to negotiations between the IDC and the successful bidder.

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

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- 8.1.** The IDC is entitled to amend any bid condition, bid validity period, RFP specification, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the IDC have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the IDC's website under the relevant tender information. All prospective bidders should therefore ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 8.2.** The IDC reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and financially advantageous to the IDC.
- 8.3.** The IDC reserves the right to conduct site visits at bidder's corporate offices and / or at client sites if so required.
- 8.4.** The IDC reserves the right to request all relevant information, agreements, and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the IDC to conduct background checks, including FICA verification, on the bidding entity and any of its directors / trustees / shareholders / members.
- 8.5.** The IDC reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).
- 8.6.** The IDC reserves the right of final decision on the interpretation of its tender requirements and responses thereto.
- 8.7.** The IDC reserves the right to consider professional conduct and experiences it had with any bidder which rendered similar services to the IDC in the past 5 years over and above the references put forward by the bidder in its response.

## **9. UNDERTAKINGS BY THE BIDDER**

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- 9.1.** By submitting a bid in response to the RFP, the bidder will be taken to offer to render all or any of the services described in the bid response submitted by it to the IDC on the terms and conditions and in accordance with the specifications stipulated in this RFP document.
- 9.2.** The bidder shall prepare for a possible presentation should IDC require such and the bidder will be required to make such presentation within five (5) days from the date the bidder is notified of the presentation. Such presentation may include a practical demonstration of products or services as called for in this RFP.
- 9.3.** The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the IDC during the bid validity period indicated in this RFP and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 9.4.** The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 9.5.** The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with IDC, as the principal(s) liable for the due fulfilment of such contract.

- 9.6.** The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with its bid will become IDC property unless otherwise stated by the bidder/s at the time of submission.

## **10. REASONS FOR DISQUALIFICATION**

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- 10.1.** The IDC reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder:
- 10.1.1. bidder whose Tax Status is non-compliant, after they have been notified accordingly and remain non-compliant.
  - 10.1.2. bidder who submits incomplete information and documentation according to the requirements of this RFP document.
  - 10.1.3. bidder who submits information that is fraudulent, factually untrue, or inaccurate information.
  - 10.1.4. bidder who receives information not available to other potential bidders through fraudulent means.
  - 10.1.5. bidder who does not comply with any of the mandatory requirements as stipulated in the RFP document.
  - 10.1.6. bidder who fails to comply with POPIA requirements as listed herein  
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)
- 11.3. 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: Acceptance of Bid Conditions and Bidder's Details (duly completed and signed).
  - 11.3.4. Annexure 3: Tax Compliance Requirements (duly completed and signed).
  - 11.3.5. Annexure 4: Bidders Disclosure (duly completed and signed).
  - 11.3.6. Annexure 5: Shareholders and Directors Information (duly completed and signed)
  - 11.3.7. Annexure 6: BEE Commitment Plan.
    - 11.3.7.1. 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.
  - 11.3.8. Annexure 7 Disclosure Statement (duly responded to).

- 11.3.9. Annexure 8 Privacy & Protection of Personal Information (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).

**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).**

#### **11.4. Schedule 3:**

Response to Section 2: Functional Requirements Specification, in line with the format indicated in this RFP document.

- 11.4.1. Annexure 1: Response format for section 2 of this RFP document duly completed and signed.

#### **11.5. Schedule 4:**

Price Proposal (response to Section 3 Cost Proposal of this RFP document).

**Note: Must be submitted as a separate file/document marked Schedule 4: Price/Cost 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 11.3.2 above.
- BEE Status Certification as referenced in 11.3.7.1 above.
- Completion of all Standard Bidding Documents and other requirements, as reflected in this RFP, which covers the following:
  - Section 2: Statement of compliance with the Functional Evaluation Criteria for this RFP.
  - Section 3: Cost Proposal and Price Declaration Form.
  - Annexure 1: Bidders Experience & Project Team.
  - Annexure 2: Acceptance of Bid Conditions.
  - Annexure 3: Tax Compliance Requirements.
  - Annexure 4: Bidder's Disclosure.
  - Annexure 5: Shareholders' Information/ Group Structure.
  - Annexure 6: BEE Commitment Plan.
  - Annexure 7: Disclosure Statement.

- Annexure 8: Privacy & Protection of Personal Information Act 4 of 2013 Requirements.

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

## 12.2. Phase 2: Technical/ Functionality Evaluation

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

### 12.2.1. Mandatory Functional/ Technical Requirements

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

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

### 12.2.2. Criteria for Small and Medium Entities: Land & Buildings Valuations

Number	ELEMENT	WEIGHT
1	Bidder's Relevant Experience	50
2	Qualifications and Skills of Proposed Team	30
3	Systems, Tools and Processes	20
<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.**

### 12.2.3. Criteria for Large Entities: Land & Buildings Valuations

Number	ELEMENT	WEIGHT
1	Bidder's Relevant Experience	50
2	Qualifications and Skills of Proposed Team	30
3	Systems, Tools and Processes	20
<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.**

### 1.1.1. Criteria for Small and Medium Entities: Plant, Equipment & Machinery Valuations

Number	ELEMENT	WEIGHT
1	Bidder's Relevant Experience	40
2	Professional Registration	20
3	Qualifications and Skills of Proposed Team	20
4	Systems, Tools and Processes	20
<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.**

### 1.1.2. Criteria for Large Entities: Plant, Equipment & Machinery Valuations

Number	ELEMENT	WEIGHT
1	Bidder's Relevant Experience	40
2	Professional Registration	20
3	Qualifications and Skills of Proposed Team	20
4	Systems, Tools and Processes	20
<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.**

### 1.2. Phase 3: Preference Point System

All bids that achieve the minimum qualifying score for Functionality (acceptable bids) will be evaluated further in terms of the preference point system, as follows:

CRITERIA	POINTS
Price	80
Specific Goals <sup>1</sup>	20
<b>TOTAL</b>	<b>100</b>

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

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

<sup>2</sup>Black ownership: 100% black owned entities will score the full 10 points, 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.

**Note:** Only enterprises with direct Black shareholding that fall under the four categories below be considered for allocation of points on Specific Goal:

- Exercisable voting rights in the hands of Black people
- Exercisable voting rights in the hands of Black women
- Exercisable voting rights in the hands of Black Designated Groups
- Employee Share Ownership Programmes (“ESOPs”) with direct shareholding and exercisable voting rights in the hands of Black People, Black woman, and Black Designated Groups

### **1.3. 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.

#### **1.3.1. 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) and the IDC Compliance and Regulatory Affairs Department (CRAD) screening report.
- 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.

## **2. PROMOTION OF EMERGING BLACK OWNED SERVICE PROVIDERS**

It is the IDC’s objective to promote transformation across all industries and/ or sectors of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this tender would be undertaken by black owned entities. To give effect to this requirement, bidders are required to submit a partnership / subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit either a consolidated B-BBEE scorecard or each bidder of the partnership in their individual capacity to submit a BEE certificate or Sworn Affidavit in case of an EME or QSE which will be considered as part of the Specific Goals scoring listed in 12.3.

## **SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION**

## SECTION 2: FUNCTIONAL REQUIREMENTS

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### 1. SPECIAL INSTRUCTIONS TO BIDDERS

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

### 2. BACKGROUND INFORMATION

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The Industrial Development Corporation of South Africa Limited (IDC) is actively involved in the financing of enterprises which are geographically spread across South Africa and the rest of Africa. In order to ensure that the IDC financing activities are adequately secured, the underlying physical assets taken/considered for security and/or shareholder's contribution have to be accurately valued.

The physical assets which are to be valued would generally be in industrial and commercial sectors, which are not limited to the following:

- Industrial buildings such as warehouses, manufacturing or processing plants/factories etc.;
- Healthcare facilities such as specialised medical facilities, medical equipment manufacturing plant etc.;
- Leisure such as recreational facilities, lifestyle farming, hotels, guesthouses and lodges;
- Specialised properties such as mines and quarries, mining rights;
- Agriculture such as livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing houses;
- Service stations;
- Mineral rights valuation;
- Meat processing plants i.e. abattoirs;
- Energy: Renewable Energy Independent Power Producer assets i.e. solar, wind power etc.; and
- Transport: Road, air and water vessels.

The IDC wishes to establish a panel of preferred service providers to be engaged on an ad hoc basis to render physical valuations of Land & Buildings and Plant, Equipment & Machinery.

**Note:**

- Technical Services will issue Panel Briefing Document (PBD) to a minimum of three service providers from the category of small and medium suppliers, and an evaluation of all responses will be conducted by Technical Services.
- Technical Services may, as and when required, allocate/ apportion work to all the panelists for bulk valuations assignment in different provinces and clients.
- The supplier in the large category will only be used in instances where all the small and medium entities could not provide the required services e.g. valuations outside South Africa.
- Performance reviews will be conducted quarterly to ensure adherence to the SLA.

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

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#### **3.1. SERVICE CATEGORY 1: LAND AND BUILDING VALUATION**

The appointed service provider/s will be required to provide Land and Building Valuation services as per sectors listed under the background information above.

Additionally, the appointed service provider/s will be required to provide on/off site mentorship and support to the Candidate Valuers and also Professional Valuers from time to time when needed. The scope of work shall include but not limited to mentorship on valuation covering valuation of Land and Building specified in the background section of this document.

##### **3.1.1 PURPOSE OF LAND AND BUILDING VALUATION**

The appointed service provider/s are required to demonstrate the ability to independently provide advisory services and determine the property values for the following purpose:

- Due diligence (structured finance for bonds and exposure, authenticating shareholder contributions, etc.);
- Balance sheet valuation requirements;
- Replacement valuations;
- Servitude valuations;
- Historical valuations;
- Acquisition and alienations of properties;
- Assets and asset verifications; and  
International Financial Reporting Standards (IFRS) requirement of valuation of tangible assets.

##### **3.1.2 LAND AND BUILDING VALUATION DELIVERABLES**

The appointed service provider/s should compile fully motivated valuation reports, which shall include, but not be limited to, the following:

- Purpose of valuation;
- Effective date of valuation;
- Property Inspection;
- Date of Inspection;

- Description/Title deed information;
- Locality and neighbourhood;
- Market overview/economic activities in the area;
- Topography, soil conditions, flood lines and shape;
- Access and egress;
- Servitudes;
- Town planning information, municipal valuation and date, rates and taxes status;
- Accommodation, sizes of the facilities, functional efficiency, condition, services;
- Highest and best use of the property;
- Valuation methodology and motivation for the adopted and rejected methods;
- Market Data and supporting documentation;
- Minimum 10 internal property/improvements & 10 external property/improvements photographs (additional photographs may be requested if required)
- Building plans or sketch plans with dimensions
- Determination of value; and
- Certificate of value.
- The bidder shall produce valuation reports that are fully compliant with the International Valuation Standards (IVSC), ensuring adherence to all relevant principles, methodologies, disclosure requirements, and reporting frameworks prescribed under the latest IVS guidelines

### **3.1.3 MENTORSHIP AND SKILLS TRAFNER**

In ensuring that the IDC Valuers meet their development needs, the service provider shall provide on/off-site mentorship on an ad hoc basis. The service provider amongst other things shall be expected to provide:

- Mentorship that will be applied or based on practical IDC valuation assignments;
- Engage candidates and provide feedback to the candidate and IDC valuations unit during report review, including consideration of
  - Candidate Valuers Assessment Needs Analysis (ANA);
  - Goals and development needs;
- Feedback on the candidate's development needs as per relevant councils requirements in aiding the Candidate Valuers in attaining professional registration; and
- Provide skills transfer and present case studies for areas which both candidates and professional valuers may not be exposed to at the IDC.

### **3.2. SERVICE CATEGORY 2: PLANT, EQUIPMENT AND MACHINERY VALUATION**

The appointed service provider/s will be required to provide Plant, Equipment and Machinery valuation services as per the sectors listed in background information above.

Additionally, the appointed service provider/s will be required to provide on/off site mentorship and support to the Candidate Valuers and also Professional Valuers from time to time when needed. The scope of work shall include but not limited to mentorship on valuation covering valuation of Plant and Equipment specified in the background section of this document.

### **3.2.1 PURPOSE OF PLANT, EQUIPMENT AND MACHINERY VALUATION**

The appointed service provider/s should demonstrate the ability to independently determine the property values for the following purpose:

- Due diligence (Structured finance for bonds and exposure, authenticating shareholder contributions, etc.);
- Balance sheet valuation requirements;
- Replacement valuations;
- Historical valuations;
- Assets conditions assessment;
- Assets and assets verification; and
- International Financial Reporting Standards (IFRS) 9 requirement of valuation of tangible assets.

### **3.2.2 VALUATION METHODOLOGY**

The bidder's attention is drawn to the following IDC's accepted and internationally recognized definitions of the following valuation methodologies for common understanding and application when undertaking IDC valuations. Depending on the IDC requirements in the determination of value, the IDC may require one or a combination of the following valuation approaches, which are defined, below:

#### **3.2.2.1 ESTIMATED NEW REPLACEMENT COST (ENRC)**

The Estimated New Replacement Cost is defined as the cost, at the date of valuation, of replacing the existing asset with similar characteristics, capabilities and/or production capacities, inclusive of all reasonable professional fees and installation costs, where applicable. In replacing existing or similar assets, we include for all costs of transport, taxes, duties, installation fees and all piping, wiring and other services, foundations, footings and finishes that are attributable to the asset.

The estimated cost of replacing the asset as if new, at prices applicable at the valuation date, inclusive of professional fees and installation costs, but exclusive of any finance charges or the cost of demolition or emergency charges.

#### **3.2.2.2 DEPRECIATED REPLACEMENT VALUE**

##### **3.2.2.2.1 Depreciated Replacement Value (Reducing Balance)**

The estimated cost of acquiring and installing a new asset or a modern substitute asset having the same productive capacity as that existing, but exclusive of finance charges, is determined. This is then depreciated according to age, obsolescence and condition to obtain the value.

This cost is only to assets being part of an operating concern and assumed adequate profitability. It does not necessarily represent the Open Market Value of the asset.

##### **3.2.2.2.2 Depreciated Replacement Value (Straight Line)**

The estimated cost of replacing the asset as if new, at prices applicable at the valuation date, inclusive of fees and installation costs but exclusive of any finance charges or demolition costs is first determined. Depreciated Replacement Cost is a monetary statement of the remaining life of the asset based on the current capital Costs.

### **3.2.3 OPEN MARKET VALUE (OMV)**

#### **3.2.3.1 Open Market Value (In-Situ)**

The amount that a buyer should pay for the assets as a whole, in situ, reflecting the fact that the machinery is already installed and commissioned. It is the price that should be paid for the assets in the event that the company is sold as a going concern. To determine this figure, we consider the cost of purchasing a substantially similar machine of a comparable condition, on the open market, then make allowance for transport, installation and commissioning costs.

#### **3.2.3.2 Open Market Value (Break-up basis)**

We assume all assets are sold individually for removal from the premises at the expense of the buyer. This value will inform the seller of expected realisations assuming a break-up sale of the assets is to be conducted in an unrestricted manner. No allowance is made for the cost incurred in conducting the sales.

### **3.2.4 FORCED SALE VALUE (FSV)**

The Forced Sale Value is the price, which might be achieved if the asset was offered for sale as an individual item by auction within a prescribed time period assuming any offer must be accepted.

### **3.2.5 RESIDUAL VALUE**

The residual value is the expected value of the asset at the end of its useful, economic and financially viable lifespan. Generally, this is the scrap value in weight of the asset.

### **3.2.6 PLANT, EQUIPMENT AND MACHINERY VALUATION DELIVARABLES**

The appointed service provider/s should compile fully motivated valuation report which shall include but not be limited to the following amongst others:

- Purpose of valuation;
- Effective date of valuation;
- Method of approach to valuation;
- Process adopted in sourcing market input data for and calculating replacement values and market values;
- A sample of any supporting cost sheets relied upon in the build-up to the concluded values (including invoices, quotes, and current listings used, as well as the names of sources or links to those sources).
- Detailed breakdown of value calculations in soft copy (Microsoft excel format);
- Market overview/economic activities in the industry in relation to the material and high value assets;
- Functional efficiency, assets condition, maintenance record;
- Valuation methodology and motivation for the adopted methods;
- Determination of value and value conclusion; and
- Valuation certificate.
- The bidder shall produce valuation reports that are fully compliant with the International Valuation Standards (IVSC), ensuring adherence to all relevant principles, methodologies, disclosure requirements, and reporting frameworks prescribed under the latest IVS guidelines.

The IDC would also like to promote 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.

The bidder must indicate, in the table below, with a tick (✓) the relevant category they are falling within:

CATEGORIES	ENTITY SIZE	DEFINITION	PLEASE TICK (✓)
Category 1	Small Entities (EMEs)	Entity with an annual turnover of not more than R10 million	
	Medium Entities (QSEs)	Entity with an annual turnover greater than R10 million but below R50 million	
Category 2	Large Entities	Entity with an annual turnover greater than R50 million	

Bidders may choose to bid for one or more service categories. The bidder must indicate, in the table below, with a tick (✓) the service category they are bidding for:

SERVICE CATEGORIES		PLEASE TICK (✓)
1.	Land and Building Valuation	
2.	Plant, Equipment and Machinery Valuation	

#### 4. AREA OF SPECIALITY

##### Land and Building Valuation

Bidders are required to clearly indicate, in the table below with a tick (✓) the area of speciality they have experience in and complete **Table (a) on Annexure 1**. The following are property types:

Property Types	Industrial buildings e.g. warehouse, manufacturing or processing plants/factories etc.	Healthcare Facilities, e.g. specialised medical facilities, medical equipment manufacturing plant	Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges	Specialised properties, e.g. mines, quarries and mining rights	Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds	Service stations	Meat processing plants i.e. abattoirs	Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.	Vacant Land
Due diligence (Structured finance for bonds and exposure, etc.)									
Balance sheet valuation requirements									
Land development valuations									
Servitude valuations									
Rental determination									
Replacement valuations									

Property Types	Industrial buildings e.g. warehouse , manufacturing or processing plants/factories etc.	Healthcare Facilities, e.g. specialised medical facilities, medical equipment manufacturing plant	Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges	Specialised properties, e.g. mines, quarries and mining rights	Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds	Service stations	Meat processing plants i.e. abattoirs	Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.	Vacant Land
Lease Valuations									
Historical valuations									
Building conditions assessment									
Expropriation valuations									
Acquisition and alienations of properties									
Assets and assets verifications									

### **Plant, Equipment and Machinery**

Bidders are required to clearly indicate, in the table below with a tick (✓) the area of speciality they have experience in and complete **Table (a) on Annexure 1**. The following are the types of asset characteristics for Plant, Equipment and Machinery:

Area of Specialisation	Please Tick ✓
Industrial e.g. warehouses, manufacturing or processing or treatment plants/factories etc.	
Healthcare Facilities e.g. specialised medical facilities, medical equipment manufacturing plant, etc.	
Specialised industries, e.g. mines, quarries, fisheries, storage depots and aviation	
Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing houses	
Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.	
Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges	
Service stations	
Meat processing plants i.e. abattoirs	
Automotive industry	
Green Industries and infrastructure e.g. wind tower and solar manufacturing plants	
Other please specify:	

**5. PROJECT TIMELINES**

The appointed service provider(s) will be required to start immediately after signing the contract and be available to provide the services, on an as-needed basis, for a period three (3) years, subject to annual review of service provider’s performance. The appointed service providers will be engaged on an as and when required basis.

**6. TECHNICAL EVALUATION CRITERIA (SMALL AND MEDIUM) AND LARGE ENTITIES FOR LAND & BUILDINGS VALUATIONS**

**6.1. Mandatory Technical Requirements**

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

6.1.1 PROFESSIONAL BODY REGISTRATION	COMPLY	NOT COMPLY
<p>The bidder’s proposed principal valuer(s) and/or proposed mentor must be registered and in good standing with the South African Council for the Property Valuers Profession (SACPVP) as a Professional Valuer without any restrictions.</p> <p>To substantiate, the bidder must submit, as part of this proposal, a SACPVP certificate(s) for the proposed principal valuer(s).</p>		
<b>Substantiate / Comments</b>		

6.1.2 PROFESSIONAL INDEMNITY INSURANCE	COMPLY	NOT COMPLY
<p>The bidder must commit to submitting adequate and valid Professional Indemnity Insurance upon confirmation of the applicable scope of works within five (5) days of appointment.</p>		
<b>Substantiate / Comments</b>		

**6.2. Other Technical Requirements: Small and Medium Entities Land & Buildings Valuations**

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

6.2.1 BIDDER'S RELEVANT EXPERIENCE	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder must have relevant experience in carrying out valuation services for different types of properties as specified in this document.</p> <p>The bidder must provide a minimum of two (2) relevant contactable references for the type of property valuation they have experience in. The references must be within the past five (5) years.</p> <p>Refer to <b>Table (b) Annexure 1</b> of this document for the response format provided.</p>			
<b>Substantiate / Comments</b>			

6.2.2 QUALIFICATIONS AND SKILLS OF PROPOSED TEAM	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's proposed team of valuer(s) must demonstrate their relevant experience in carrying out valuation services in different types of properties and for different purposes.</p> <p>The bidder's proposed principal valuer(s) must have a minimum qualification of a National Diploma in Property Valuation or any other equivalent qualification from a recognised institution.</p> <p>The bidder 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 (d) Annexure 1</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the proposed resources/valuer(s) and the CVs must clearly qualifications and areas of experience/ competence. CVs to also be accompanied by copies of the resources qualification certificates.</li> </ul>			
<b>Substantiate / Comments</b>			

6.2.3 SYSTEMS, TOOLS AND PROCESSES	COMPLY	PARTIALLY COMPLY	NOT COMPLY
The bidder is required to clearly outline the systems, tools, equipment and processes at their disposal to deliver on valuation assignments.			
The bidder must provide their current systems, tools and processes and how they will be utilized to deliver on assignments.			
<b>Substantiate / Comments</b>			

**6.3. Other Technical Requirements: Large Entities Land & Buildings Valuations**

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

6.3.1 BIDDER'S RELEVANT EXPERIENCE	COMPLY	PARTIALLY COMPLY	NOT COMPLY
The bidder must have relevant experience in carrying out valuation services for different types of properties as specified in this document.			
The bidder must provide a minimum of three (3) relevant contactable references for the type of property valuation they have experience in. The references must be within the past five (5) years.			
Refer to <b>Table (b) Annexure 1</b> of this document for the response format provided.			
<b>Substantiate / Comments</b>			

6.3.2 QUALIFICATIONS AND SKILLS OF PROPOSED TEAM	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's proposed team of valuer(s) must demonstrate their relevant experience in carrying out valuation services in different types of properties and for different purposes.</p> <p>The bidder's proposed principal valuer(s) must have a minimum qualification of an Advanced Diploma/Degree in Property Valuation or any other equivalent qualification from a recognised institution.</p> <p>The bidder 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 (d) Annexure 1</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the proposed resources/valuer(s) and the CVs must clearly qualifications and areas of experience/ competence. CVs to also be accompanied by copies of the resources qualification certificates.</li> </ul>			
<b>Substantiate / Comments</b>			

6.3.3 SYSTEMS, TOOLS AND PROCESSES	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder is required to clearly outline the systems, tools, equipment and processes at their disposal to deliver on valuation assignments.</p> <p>The bidder must provide their current systems, tools and processes and how they will be utilized to deliver on assignments.</p>			
<b>Substantiate / Comments</b>			

## 7. TECHNICAL EVALUATION CRITERIA (SMALL AND MEDIUM) AND LARGE ENTITIES PLANT, EQUIPMENT AND MACHINERY VALUATION VALUATIONS

### 7.1. Mandatory 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 clearly referenced.

7.1.1 PROFESSIONAL INDEMNITY INSURANCE	COMPLY	NOT COMPLY
The bidder must commit to submitting adequate and valid Professional Indemnity Insurance upon confirmation of the applicable scope of works within five (5) days of appointment.		
<b>Substantiate / Comments</b>		

**7.2. Other Technical Requirements: Small and Medium Entities Plant Equipment & Machinery Valuations**

7.2.1 BIDDER'S RELEVANT EXPERIENCE	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder must have relevant experience in carrying out valuation services for different types of assets as specified in this document.</p> <p>To substantiate the bidder is required to provide two (2) relevant contactable for the asset type they have experience in. The references must in within the past five (5) years.</p> <p>Refer to <b>Table (c) Annexure 1</b> of this document for the response format provided.</p>			
<b>Substantiate / Comments</b>			

7.2.2 PROFESSIONAL BODY REGISTRATION	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's proposed key individual and/or proposed mentor must be registered/affiliated and in good standing with the appropriate Societies/Associates such as Royal Institute of Chartered Surveyors (RICS), American Society of Appraisers (ASA), and any other relevant industry bodies.</p> <p>To substantiate, the bidder must submit, as part of this proposal a copy their proof of registration to confirm compliance.</p>			
<b>Substantiate / Comments</b>			

7.2.3 QUALIFICATIONS AND SKILLS OF PROPOSED TEAM	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's proposed team of valuer(s) must demonstrate their relevant experience in carrying out valuation services in different types of assets.</p> <p>The bidder's proposed principal valuer(s) must have a minimum qualification of a National Diploma in Valuations, Process Engineering or any other relevant qualification from a recognised institution.</p> <p>The bidder 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 (e) Annexure 1</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the proposed resources/valuer(s) and the CVs must clearly qualifications and areas of experience/ competence. CVs to also be accompanied by copies of the resources qualification certificates</li> </ul>			
<b>Substantiate / Comments</b>			

7.2.4 SYSTEMS, TOOLS AND PROCESSES	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder is required to clearly outline the systems, tools, equipment and processes at their disposal to deliver on valuation assignments.</p> <p>The bidder must provide their current systems, tools and processes and how they will be utilized to deliver on assignments.</p>			
<b>Substantiate / Comments</b>			

**7.3. Other Technical Requirements: Large Entities Plant Equipment & Machinery Valuations**

7.3.1 BIDDER'S RELEVANT EXPERIENCE	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder is required to have relevant experience in carrying out valuation services in different types of assets for different purposes.</p> <p>To substantiate the bidder is required to provide three (3) relevant contactable references of valuation services done in the past five (5) years.</p> <p>Refer to <b>Table (c) Annexure 1</b> of this document for the response format provided.</p>			
<b>Substantiate / Comments</b>			

7.3.2 PROFESSIONAL BODY REGISTRATION		PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's proposed key individual and/or proposed mentor must be registered/affiliated and in good standing with the appropriate Societies/Associates such as Royal Institute of Chartered Surveyors (RICS), American Society of Appraisers (ASA), and any other relevant industry bodies.</p> <p>To substantiate, the bidder must submit, as part of this proposal a copy their proof of registration to confirm compliance.</p>			
<b>Substantiate / Comments</b>			

7.3.3 QUALIFICATION AND SKILLS OF PROPOSED TEAM	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder's proposed team of valuer(s) must demonstrate their relevant experience in carrying out valuation services in different types of assets.</p> <p>The bidder's proposed principal valuer(s) must have a minimum qualification of an Advanced Diploma/Degree in Valuations, Process Engineering or any other relevant qualification from a recognised institution.</p> <p>The bidder must submit, as part of their proposal the following:</p> <p>The bidder 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 (e) Annexure 1</b> of this document for the format in which the required information must be provided.</li> <li>• CVs of the proposed resources/valuer(s) and the CVs must clearly qualifications and areas of experience/ competence. CVs to also be accompanied by copies of the resources qualification certificates</li> </ul>			
<b>Substantiate / Comments</b>			

7.3.4 SYSTEMS, TOOLS AND PROCESSES	COMPLY	PARTIALLY COMPLY	NOT COMPLY
<p>The bidder is required to clearly outline the systems, tools, equipment and processes at their disposal to deliver on valuation assignments.</p> <p>To substantiate the bidder must submit a detailed proposed methodology to outline the above.</p>			
<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
<i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i>		

5. Payments will be linked to specified deliverables after such deliverables have been approved by the IDC. Payments will be made within 30 days from date of invoice.	Comply	Not Comply

6. The IDC reserves the right to consider the guidelines on consultancy rates as set out in the <b>National Treasury Instruction 02 of 2016/2017: Cost Containment Measures</b> which took effect from 01 January 2014, where relevant.	Comply	Not Comply
The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures. <b>The “Guide on Hourly Fee Rates for Consultants” as issued by the Department of Public Service and Administration (DPSA); or Remuneration guidelines issued by professional service organisations or regulatory bodies, may be relevant.</b>		
Substantiate / Comments		

## 7. COSTING MODEL

**Table A: Land and Building Valuations**

The preferred bidders will be engaged on a need basis (ad-hoc); therefore, for evaluation purposes, bidders are required to provide prices based on the following property types and value.

### 1. Industrial Buildings e.g. warehouse, manufacturing or processing plants/ factories etc.

Property Type		Industrial Buildings e.g. warehouse, manufacturing or processing plants/ factories etc.
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**2. Healthcare Facilities e.g. specialised medical facilities, medical equipment manufacturing plant**

Property Type		Healthcare Facilities e.g. specialised medical facilities, medical equipment manufacturing plant
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**3. Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges**

Property Type		Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	

Property Type		Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges
Value of Property		Valuation Fee
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

#### 4. Specialised Properties e.g. mines, quarries and mining rights

Property Type		Specialised Properties e.g. mines, quarries and mining rights
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**5. Agriculture e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds**

Property Type		Agriculture e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**6. Service stations**

Property Type		Service stations
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	

Property Type		Service stations
Value of Property		Valuation Fee
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

### 7. Meat processing plant i.e. abattoirs

Property Type		Meat processing plants i.e. abattoirs
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**8. Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.**

Property Type		Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	
	Year 3	
Over R100 000 000	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**9. Vacant Land**

Property Type		Vacant Land
Value of Property		Valuation Fee
From R1 to R1 000 000	Year 1	
	Year 2	
	Year 3	
From R1 000 000 to R5 000 000	Year 1	
	Year 2	
	Year 3	
From R5 000 000 to R10 000 000	Year 1	
	Year 2	
	Year 3	
From R10 000 000 to R25 000 000	Year 1	
	Year 2	
	Year 3	
From R25 000 000 to R50 000 000	Year 1	
	Year 2	
	Year 3	
From R50 000 000 to R100 000 000	Year 1	
	Year 2	

Property Type		Vacant Land
Value of Property		Valuation Fee
Over R100 000 000	Year 3	
	Year 1	
	Year 2	
	Year 3	
<b>Total Valuation Fee (A) VAT Excl.</b>		
<b>Vat at 15% (if applicable)</b>		
<b>Total Price (A) (Vat Incl.)</b>		

**Table B: Plant, Equipment and Machinery Valuations**

The preferred bidders will be engaged on a need basis (ad-hoc); therefore, for evaluation purposes, bidders are required to provide prices based on the following.

Asset Description	Serial No.	Year	Original Cost	Asset Valuation Fee	Total Excl. VAT
Spibmm SC-11PM VSD Rotary Screw Packaged Air compressor	AML243	2022	R681 763.00		
Conveyor system	AML001	2022	R852 204.00		
Extraction system	AML085	2022	R483 695.00		
Nissan NP 200	SUP039	2019	R239 033.20		
ASUS VZ279HE 27" FHD EyeCare Frameless IPS Monitor	FA-0007	2020	R3 825.21		
Pressure Machine	SUP024	2018	R2 500.00		
Wall Mounted Board	SUP026	2018	R350.00		
<b>Total Cost (B) (VAT Excl.)</b>					
<b>Vat at 15% (if applicable)</b>					
<b>Total Price (B) (Vat Incl.)</b>					

**PRICE DECLARATION FORM**

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. **T30-06-26**, the General Conditions, The Requirement and all other Annexures to the RFP Document, panel of service providers for land & building valuations and plant, equipment and machinery valuations to the IDC, at a total amount of:

**Service Category: Land & Buildings Valuations**

**1. Industrial Buildings e.g. warehouse**

R..... (Including VAT)  
In words

R.....(Including VAT)

**2. Healthcare Facilities e.g. specialised medical facilities, medical equipment manufacturing plant**

R..... (Including VAT)  
In words

R.....(Including VAT)

**3. Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges**

R..... (Including VAT)  
In words

R.....(Including VAT)

**4. Specialised Properties e.g. mines, quarries and mining rights**

R..... (Including VAT)  
In words

R.....(Including VAT)

**5. Agriculture e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage and packing sheds**

R..... (Including VAT)

In words

R.....(Including VAT)

**6. Service Stations**

R..... (Including VAT)

In words

R.....(Including VAT)

**7. Meat Processing Plants e.g. abattoirs**

R..... (Including VAT)

In words

R.....(Including VAT)

**8. Energy Renewable Independent Power Producers, Solar and Wind Turbines etc.**

R..... (Including VAT)

In words

R.....(Including VAT)

**9. Vacant Land**

R..... (Including VAT)

In words

R.....(Including VAT)

**Service Category: Plant, Equipment and Machinery Valuations**

R..... (Including VAT)  
In words

R.....(Including VAT)

We confirm that this price covers all activities associated with the project management and consulting service, as called for in the Tender document. We confirm that IDC will incur no additional costs whatsoever over and above this amount in connection with the provision of this service.

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

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

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

**SIGNED** \_\_\_\_\_ **DATE** \_\_\_\_\_

(Print name of signatory) \_\_\_\_\_  
Designation \_\_\_\_\_

<b>FOR AND ON BEHALF OF:</b>	<b>COMPANY NAME</b>	_____
	Tel No	_____
	Fax No	_____
	Cell No	_____

## **SECTION 4: ANNEXURES**

## ANNEXURE 1: RESPONSE FORMAT FOR SECTION 2

### Bidder's Experience and the proposed Project Team

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

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

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

**Table (a) Bidder's experience in various asset types for Plant, Equipment and Machinery Valuations:**

Area of Specialisation	Please Tick ✓
Industrial e.g. warehouses, manufacturing or processing or treatment plants/ factories etc.	
Healthcare Facilities e.g. specialised medical facilities, medical equipment manufacturing plant, etc.	
Specialised properties, e.g. mines and quarries, mining right	
Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing houses	
Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.	
Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges	
Service stations	
Meat processing plants i.e. abattoirs	
Other please specify:	

**Table (a) Bidder's experience in property types for the Land and Building Valuations:**

<b>Property Types</b>	<b>Industrial buildings e.g. warehouse, manufacturing or processing plants/factories etc.</b>	<b>Healthcare Facilities, e.g. specialised medical facilities, medical equipment manufacturing plant</b>	<b>Leisure e.g. recreational facilities, lifestyle farming, hotels, guesthouses and lodges</b>	<b>Specialised properties, e.g. mines, quarries and mining rights</b>	<b>Agriculture, e.g. livestock, game and dairy, permanent crops, winery, cash crops, silos, cold storage, packing sheds</b>	<b>Service stations</b>	<b>Meat processing plants i.e. abattoirs</b>	<b>Energy: Renewable Independent Power Producers, Solar and Wind turbines, etc.</b>	<b>Vacant Land</b>
Due diligence (Structured finance for bonds and exposure, etc.)									
Balance sheet valuation requirements									
Land development valuations									
Servitude valuations									
Rental determination									
Replacement valuations									
Lease Valuations									
Historical valuations									
Building conditions assessment									
Expropriation valuations									
Acquisition and alienations of properties									
Assets and assets verifications									

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

**Table (b) Details of the bidder's experience in property valuations (please refer to Section 2 par 6.2.1 and 6.3.1):**

<b>Client' Name</b>	<b>Industry</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 (c) Details of the bidder's experience in plant, equipment and machinery valuations (please refer to Section 2 par 7.2.1 and 7.3.1):**

<b>Client' Name</b>	<b>Industry</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 (d) Details of the key personnel of the bidders' proposed team: (please refer to par 6.2.2 and 6.3.2 of Section 2 of this RFP document):**

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

**Table (e) Details of the key personnel of the bidders' proposed team: (please refer to par 7.2.3 and 7.3.3 of Section 2 of this RFP document):**

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

**ANNEXURE 2: ACCEPTANCE OF BID CONDITIONS AND BIDDER'S DETAILS**

Request for Proposal No: \_\_\_\_\_  
 Name of Bidder: \_\_\_\_\_  
 Authorised signatory: \_\_\_\_\_  
 Name of Authorised Signatory \_\_\_\_\_  
 Position of Authorised Signatory \_\_\_\_\_

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

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

**CENTRAL SUPPLIER DATABASE (CSD) INFORMATION**

<b>Bidders that are registered on the Central Supplier Database (CSD) of National Treasury are required to submit as part of this proposal both their CSD supplier number and CSD unique registration reference numbers below:</b>	
<b>Supplier Number</b>	_____

**BIDDING STRUCTURE**

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

**REQUIRED INFORMATION**

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

<b>If Joint Venture or Consortium, indicate the following for each partner:</b>	
<b>Partner 1</b>	
Name of Company	_____
Registration Number	_____
Vat registration Number	_____
Contact Person	_____
Telephone Number	_____
Cell phone 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	
Cell phone 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	
Cell phone Number	
Email address	
Postal Address	
Physical Address	
<b>Work as a % of the total value of the contract and description of the work</b>	
<b>Sub-contractors</b>	
Name of Company	
Company Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Email address	
Postal Address	
Physical Address	
<b>Subcontracted work as a % of the total value of the contract and description of the work</b>	

**ANNEXURE 3: TAX COMPLIANCE REQUIREMENTS**

<b>1. TAX COMPLIANCE REQUIREMENTS</b>			
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.			
<b>2. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>			
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 STATUS	COMPLIANCE	TAX COMPLIANCE SYSTEM PIN:	

**ANNEXURE 4: BIDDER'S DISCLOSURE**

**1. PURPOSE OF THE FORM**

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

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

**2. BIDDER'S DECLARATION**

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

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

Full name	Identity Number	Name of State Institution

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

2.2.1 If so, furnish particulars:

.....  
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....  
.....

---

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

**3 DECLARATION**

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

- 3.1 I have read, and I understand the contents of this disclosure.
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement, or arrangement with any competitor. However, communication between partners in a joint venture or 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.
- 3.5 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.
- 3.6 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.
- 3.7 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**

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 8.4, 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 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** COMPANY \_\_\_\_\_

**OF:** 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 their members will ensure that information is only processed for a 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 their 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"/>

ITEM	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	YES	NO
6.	<b>Open Communication</b> 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.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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 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