



T28/07/23

**ELECTRIC MOBILITY TRANSITION AND
LOCALISATION: TOWARDS
UNLOCKING THE NEV VALUE CHAIN
FOR AFRICA**

**BID CLOSING DATE:
19 JULY 2023 AT 11:00 AM**

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SECTION 1: GENERAL CONDITIONS OF BID

1. Proprietary Information

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

2. Enquiries

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

Name: Mr Luyanda Dlamini

Telephone Number: Office: +27 11 269 3767

Email address: luyandad@idc.co.za

- 2.2 Enquiries in relation to this RFP will not be entertained after **16h00 on 11 July 2023**.
- 2.3 The enquiries will be consolidated, and IDC will issue one response and such response will be posted, within two days after the last day of enquiries, onto the IDC website (www.idc.co.za) under tenders i.e., next to the same RFP document.
- 2.4 The IDC may respond to any enquiry in its absolute discretion and the bidder acknowledges that it will have no claim against the IDC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

3. Bid Validity Period

Responses to this RFP received from bidders will be valid for a period of **120** days counted from the bid closing date.

4. Instructions on submission of Bids

- 4.1 Bid responses must be submitted in electronic format only.
- 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 **19 July 2023** not later than **11:00 AM (before midday)**. No late bids will be considered. Bids must **only** be uploaded on **IDC e-tender portal**, any tender submitted by other means than the one specified herein will be disqualified and will not be considered for evaluation.
- 4.4 The IDC will not be held responsible for any of the following:
- 4.4.1 bid responses not submitted via IDC e-tender portal;
 - 4.4.2 bid responses being inaccessible due to non-standard electronic file formats being utilised to submit responses by bidders;
 - 4.4.3 any security breaches and unlawful interception of tender / bid responses by third parties outside the IDC's IT network domain;

4.4.4 bid responses received late due to any IT network related congestions and/or technical challenges; and

4.5 Where a complete bid response (Inclusive of all relevant Schedules) is **not uploaded on the IDC e-tender portal** by the closing date and time, such a bid response will be regarded as incomplete. Such incomplete bid will be disqualified.

4.6 Amended bids may be uploaded **before** the closing date and time of the bid.

5. Preparation of Bid Response

5.1 All the documentation submitted in response to this RFP must be in English.

5.2 The bidder is responsible for all the costs that it shall incur related to the preparation and submission of the bid document.

5.3 Bids submitted by bidders which are 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.

6. Supplier Performance Management

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.

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.

Successful bidders will be required to comply with the above condition, and also provide a scorecard on how their product / service offering is being measured to achieve the objectives of this condition.

7. Enterprise and Supplier Development

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

8. IDC's Rights

8.1 The IDC is entitled to amend any bid condition, bid validity period, RFP specification, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the IDC have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the IDC's website under the relevant tender information. All prospective

bidders should therefore ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.

- 8.2 The IDC reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the IDC.
- 8.3 The IDC reserves the right to award this bid as a whole or in part.
- 8.4 The IDC reserves the right to conduct site visits at bidder's corporate offices and / or at client sites if so required.
- 8.5 The IDC reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the **National Treasury Instruction 02 of 2016/2017: Cost Containment Measures**, where relevant.
- 8.6 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.
- 8.7 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).
- 8.8 The IDC reserves the right of final decision on the interpretation of its tender requirements and responses thereto.
- 8.9 The IDC reserves the right to consider professional conduct and experiences it had with any bidder which rendered similar services to the IDC in the past 5 years over and above the references put forward by the bidder in its response.

9. Undertakings by the Bidder

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

- 9.5** The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with IDC, as the principal(s) liable for the due fulfilment of such contract.
- 9.6** The bidder accepts that all costs incurred in the preparation, presentation and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with its bid will become IDC property unless otherwise stated by the bidder/s at the time of submission.

10. Reasons for disqualification

- 10.1** The IDC reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder, however the bidder will be notified in writing of such disqualification:
- 10.1.1 bidders whose Tax Status is non-compliant on the Central Supplier Database (CSD), after they have been notified accordingly and still remain non-compliant;
 - 10.1.2 bidders who submit incomplete information and documentation according to the requirements of this RFP document;
 - 10.1.3 bidders who submit information that is fraudulent, factually untrue, or inaccurate information;
 - 10.1.4 bidders who receive information not available to other potential bidders through fraudulent means;
 - 10.1.5 bidders who do not comply with any of the **mandatory requirements** as stipulated in the RFP document;
 - 10.1.6 bidders who fail to comply with POPIA requirements as listed herein.

11. Returnable Schedules

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

- 11.1 Cover Page:** (the cover page must clearly indicate the RFP reference number, bid description and the bidder's name)
- 11.2 Schedule 1:**
- 11.2.1 Executive Summary (explaining how you understand the requirements of this RFP and the summary of your proposed solution)
 - 11.2.2 Annexure 1 of this RFP document (duly completed and signed)
- 11.3 Schedule 2**
- 11.3.1 Copy of Board Resolution, duly certified;
 - 11.3.2 Originally certified copy of ID document for the Company Representative
 - 11.3.3 Annexure 2 of this RFP document (duly completed and signed);
 - 11.3.4 Annexure 3 of this RFP document (duly completed and signed);
 - 11.3.5 Annexure 4 of this RFP document (duly completed and signed);
 - 11.3.6 Response to Annexure 6: BEE Commitment Plan
 - 11.3.7 Bidders must submit a B-BBEE verification certificate. For Exempted Micro Enterprises (EME) with an annual revenue of less than R10 million and Qualifying Small Enterprises (QSE) with an annual revenue of between R10 million and R50 million per annum, a

sworn affidavit confirming the annual total revenue and level of black ownership may be submitted. Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

Note: If a bidder is a Consortium, Joint Venture or Prime Contractor with Subcontractor(s), the documents listed above must be submitted for each Consortium/ JV member or Prime Contractor and Subcontractor(s).

- 11.3.8 Annexure 7 of this RFP document (duly responded to)
- 11.3.9 Annexure 8 of this RFP document (duly completed and signed, if applicable);
- 11.3.10 Annexure 9 of this RFP document (duly completed and signed);
- 11.3.11 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.
- 11.3.12 Copy of Joint Venture/ Consortium/ Subcontracting Agreement duly signed by all parties (if applicable)
- 11.4 Schedule 3:**
 - 11.4.1 Response to Section 2 of this document, in line with the format indicated in this RFP document.
 - 11.4.2 Annexure 5 of this RFP document duly completed and signed.
- 11.5 Schedule 4:** Price Proposal (response to Section 3 of this RFP document) *(Must be submitted as a separate file/document marked Schedule 4: Price Proposal)*

12. Evaluation Criteria and Weightings

Bids shall be evaluated in terms of the following process:

- 12.1 Phase 1: Initial Screening Process:** During this phase, bid responses will be reviewed for purposes of assessing compliance with RFP requirements including the general bid conditions and also the Specific Conditions of Bid, which requirements include the following:
 - Verification of Central Supplier Database (CSD) registration, Company Registration status, tax compliance status and any other relevant checks conducted on CSD.
 - Submission of ID copy for the Company Representative as referenced in 12.3.4 above.
 - BEE Status Certification as referenced in 12.3.11 above.
 - Completion of all Standard Bidding Documents and other requirements, as reflected in this RFP, which covers the following:
 - Section 2: Statement of compliance with the Functional Evaluation Criteria for this RFP
 - Section 3: Cost Proposal and Price Declaration Form
 - Annexure 1: Acceptance of Bid Conditions
 - Annexure 2: Tax Compliance Requirements
 - Annexure 3: Bidder's Disclosure
 - Annexure 4: Shareholders' Information/ Group Structure
 - Annexure 5: Bidders Experience & Project Team
 - Annexure 6: BEE Commitment Plan
 - Annexure 7: Disclosure Statement

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

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.

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

12.2.2 Other Functional/ Technical Requirements

With regards to the other Functional Requirements, the following criteria (set out in more detail in section 2 of this RFP document) and the associated weightings will be applicable:

ELEMENT	WEIGHT
Bidder's Relevant Experience in Value Chain Studies	25
Bidder's Relevant Experience in Pre-Feasibility Studies	25
Bidders Methodology to Execute and Project Plan	15
Qualifications, Skills, and Experience of The Team Leader	10
Qualifications, Skills, and Experience of Modelling Specialist	5
Qualifications, Skills, and Experience of Strategy Development/Planner or Programme Manager	5
Qualifications, Skills, and Experience of Automotive or Mobility Specialist	5
Presentations	10
TOTAL	100

Note: Bidders who score 63 points out of 90 points (70%) or more in total for the functional/technical requirements, will be shortlisted for presentations.

All bids that fail to achieve the minimum overall qualifying score of 70% on functional/technical requirements, including the presentation, will not be considered for further Price and BEE evaluation.

12.3 Phase 3: Preference Point System

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

CRITERIA	POINTS
Price	80
Specific Goals	20
TOTAL	100 points

Specific Goals for this tender and points that may be claimed are indicated per table below:

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

Black ownership: 100% black owned entities will score the full 10 points, and between 51% - 99.99% black owned entities will score 4 points.

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.

13. Promotion of Emerging Black owned Service Providers

It is the IDC's objective to promote transformation across all industries and/ or sectors of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this tender would be undertaken by black owned entities. To give effect to this requirement, bidders are required to submit a partnership / subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit either a consolidated B-BBEE scorecard or each bidder of the partnership in their individual capacity to submit a BEE certificate or Sworn Affidavit in case of an EME or QSE which will be considered as part of the Specific Goals scoring listed in 13.3.

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION

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

Industry Overview

Domestic Market¹:

The automotive sector has been a success story of the South African manufacturing sector. This is due to the support provided by government in the form of incentives and policies that have allowed for the co-existence of both local manufacturing and high propensity for imported vehicles. Total vehicle production in 2019 and 2020 was 631 921 units and 447 218 units, exceeding new vehicle sales in the domestic market of 536 612 units and 380 206 units respectively². South Africa’s vehicle production as a percentage of Africa’s vehicle production is ca. 59% and globally South Africa’s vehicle production ranks 22nd with a global production share of 0.69% in 2019. The sector contributed 4.9% to GDP in 2020 (6.4% in 2019) and accounted for 18.7% of manufacturing output (27.6% in 2019) and 13.9% of exports (15.5% in 2019). Given the magnitude of the sector and contribution to economic and developmental indicators, the transition for this sector to cleaner fuels, new drive trains and green manufacturing will be key for its survival.

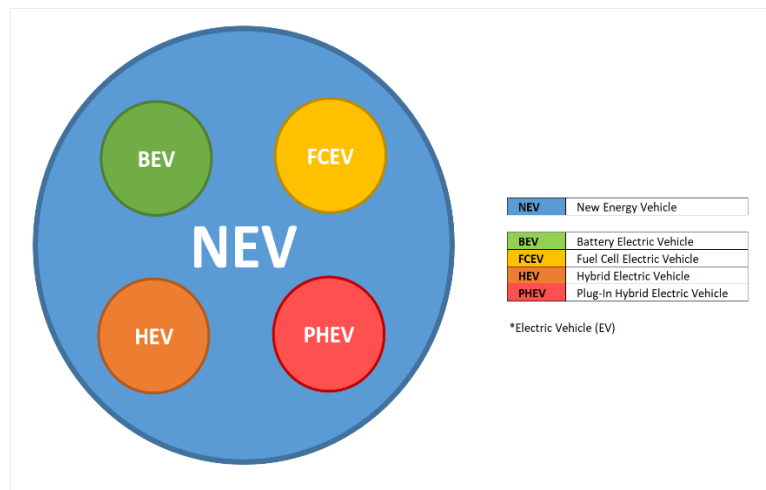
New Energy Vehicles (NEVs)³:

NEVs are vehicles that are powered by electricity or fuels made from non-fossil fuel sources. NEV collectively refers to either of the following power and drive train modes (1) battery electric vehicles (BEV), (2) fuel cell electric vehicles (FCEV), (3) hybrid electric vehicles (HEV) and (4) plug in hybrid electric vehicles (PHEV). HEV are either self-charging or have the option of allowing the on-board battery to be charged. These vehicles can consist of a combination of internal combustion engines (ICE), batteries and fuel cells.

¹ IDC R&I and NAAMSA data

² New vehicles sales in South Africa consist of locally produced and imports vehicles. South Africa typically exports 66% of locally produced vehicles.

³ Dtic (2021) AUTO GREEN PAPER ON THE ADVANCEMENT OF NEW ENERGY VEHICLES IN SOUTH AFRICA, THE SOUTH AFRICAN ROAD TO PRODUCTION OF ELECTRIC VEHICLES (THE ROADMAP, 18th May 2021



In May 2021, **the dtic** released the green paper on new energy vehicles (NEVs) for public comment. This clear intention from government signalled to the automotive value chain that South Africa was ready for the transition from ICE to NEV.

The white paper is in the process of being developed through a series of studies and private sector engagements. South Africa is part of the global value chain as a key regional hub within Africa and for many major OEM's such as Ford, VW and Mercedes Benz, the wheels of change with regards to NEVs that are already in motion as Toyota and Mercedes are already producing hybrids in South Africa.

Government and private sector are already developing policy and incentive packages to promote the localisation of NEV manufacturing. In addition, local component manufacturing is capable of building NEV components as they are like ICEV components, with some already supplying NEV builds in export markets. Investment in the battery and fuel cell value chain will be required to strengthen our component offerings. From a market perspective, a lot needs to be done to stimulate local demand for NEVs. Currently South Africa sells on average one hundred (100) NEV per annum⁴. Through the NEV policy position, government aims to ensure that the auto sector has sufficient capacity to navigate the changing export demand cycles and protect against job losses at plant level, export revenue and a substantial drop in the Auto Sector contribution to manufacturing GDP. Therefore, South Africa must accelerate its EV transformation.

Industry Challenges and Constraints:

The South African automotive industry challenges include, but not limited to:

⁴ This statistic may be outdated as latest figures indicate that in 3 quarters of 2021, 896 PHEVs, BEVs and HEVs were sold.

- 1) Growth in the regional market, which is currently undermined by low levels of disposable income and pre-owned or “grey” imports and maintain preferential market access to developing economies;
- 2) The sustained growth and development of automotive component manufacturing throughout the tiers of the value chain such that production capabilities can be deepened and used to supply regional and global value chains;
- 3) The local production share remains small relative to the global volumes (<0.69%);
- 4) South Africa’s average vehicle local content remains low at below 40%, despite governments efforts to support localisation;
- 5) Stricter emissions standards required in export markets, such as the EU which accounts for over 50% of vehicle exports, will have a negative impact on localisation efforts and return on existing investments geared towards less compliant vehicle models;
- 6) Technology changing exponentially, with advances in telemetry and autonomous vehicles, production techniques and the rapid shift towards NEV from ICEV. This will put pressure on industry to invest in new manufacturing capacity and may result in significant shifts in the global value chain;
- 7) South Africa’s industry suffers from low level of empowerment, despite transformation being at the core of industry development and support from government; and
- 8) Automotive sector commands about 80% of all manufacturing subsidies and grants, leaving very little for other sectors. Over the past five (5) years, the industry in terms of job creation and output has been either stagnant or declining.

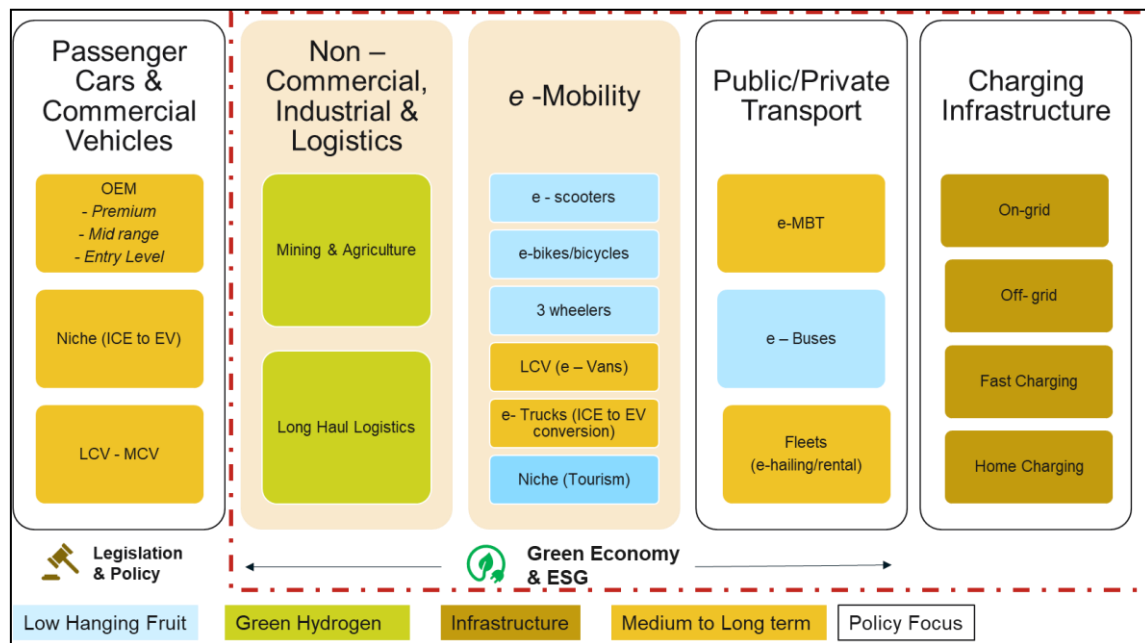
The SAAM 2035 is designed to unlock many of the above industry challenges and constraints. Growing local content and increasing jobs are government policy objectives and at the core to government support for the industry. However, NEVs presents opportunities in other mobility sectors that might fall either outside of the current policy support or not be given the same level of support as the export driven passenger, LCV – MCV in the mainstream automotive supply chain. Many of these opportunities can improve the localisation of NEVs but may not be heavily export orientated and thus falling short of requirements under incentive tools such as the APDP.

Work undertaken by Green Cape⁵ and Bloomberg NEF⁶ illustrates that the NEV market should be viewed in terms of various segments (Figure 1) and these segments each present different opportunities for adoption, localisation, and industrialisation of markets for new entrants.

⁵ Green Cape (2022) Electric Vehicles Market Intelligence Report

⁶ Bloomberg NEF (2022) Electric Vehicle Outlook

Figure 1: NEV Segmentation⁷



Furthermore, capitalising on these opportunities could lead to the aggregation of energy storage for mobility applications and the development of a battery value chain.

3. Scope of work/Terms of reference

The aim of the study is to identify opportunities in the new energy vehicle market that falls outside of the mainstream OEM supply chain (passenger cars) and in markets that are driven to transition and adopt the electrification of transport due to factors such as ESG, shareholder value and the just transition within South Africa and SADC. The outcome of the study is divided into two phases (1) a comprehensive report unpacking NEVs by segment (vehicle to component value chain), modeling the impact of each segment, guidance on policy and incentives, identifying opportunities and strategic partners, and ranking these opportunities; (2) a scoping / pre - feasibility study on the highest ranked opportunity(ies). The final product should be able to guide the IDC and other stakeholders to decide on investments that will yield positive economic and developmental benefits for South Africa.

The study should focus on the following NEV segments:

1. Micro-mobility (2 wheeled (e-bikes and bicycles) and 3-wheeled);
2. E-mobility (small segment vehicles, light delivery vehicles (LDVs), Conversions, Niche applications, skateboard platform or ladder chassis vehicles);

⁷ Source: IDC Industry Planning

3. Public transport (Buses, Minibus Taxis);
4. Machinery and equipment (Non-commercial) (Industrial, Mining & Agriculture, and other) and Long-Haul Logistics;
5. Battery value chain for mobility applications (Cell components to battery pack battery-Recycling/2nd life); and
6. Charging and associated infrastructure for mobility applications.

Some of the key questions that the study should answer are:

How can the NEV transition contribute to the decarbonisation of mobility and manufacturing?

The study should unpack the automotive value chain and all its key stakeholders and demonstrate how the industry intends to transition and how it likely will transition. The South African automotive industry is a key contributor to National GDP, exports, and manufacturing jobs. Therefore, there is a need to understand the impact of the transition at a macroeconomic and developmental level.

Where are the opportunities and risks in NEV market segmentation and products?

The NEV market is often associated mainly with passenger vehicle OEMs such as Tesla's etc., however, the electric vehicle has the potential to decarbonise several vital sectors associated with industrialisation (mining or agriculture) or new economic growth sectors such as e-mobility, eco-tourism, and public transport (Refer to Figure 1 above). The study should therefore unpack the NEV market into these various segments and analyse the current market situation, trends, and opportunities at a primary and secondary level. Understanding the emissions footprint on a segment basis will be key to determining which areas to target and where the investment opportunities lie in terms of low-hanging fruit and medium to long term. The NEV market should be mapped in terms of segmentation and products/vehicle types, stakeholders (private and public), and contribution to CO2 emission reductions, demand drivers, components and key raw materials, investments and overlapping opportunities.

What impact will the transition have on the Automotive supply chain and how can the supply chain pivot towards other NEV segments?

The automotive supply chain is a critical element for the industry and positioning South Africa as a regional manufacturing hub, therefore understanding the impact of the assembly and component manufacturing supply chain and the implications for the transformation of the industry in the context of the NEV transition will be key. This will include components that are lost to the transition and new components which will be critical. The value chain of critical components should also be mapped and understood down to a material, investment, and stakeholder level to arrive at a realistic view of localisation and show opportunities for expansion & growth, or even brand-new product markets. The enabling eco-system considerations should also consider homologation and testing requirements relative to existing regulations.

Policy analysis and how to best position the automotive sector for the transition?

The policy environment and its levers will be critical for the survival of the industry as it transitions, therefore careful analysis of the current policy framework and tools will be necessary, in addition to the analysis of developed and developing countries where the transition has been successful. The current Automotive Production and Development Programme (APDP) structures have served the industry well, but the transition and the level of investment required may stretch the current policy tools to their limit. How can the current policy tools be amended, supplemented, and supported to ensure that South Africa can transition and unlock opportunities? Does the current APDP tools and requirements allow for all segments of NEV to benefit from government incentives and if not, what needs to be done. What incentive and tax schemes are appropriate given South Africa's fiscal challenges? Does the current policy tools and taxes create an environment of unfair competition between existing players and new entrants? Are there any interim measures that government could use to unlock the NEV opportunities? APDP specifically excludes motorcycles, and they will not benefit the localisation of e-bikes. What motivation is required for the inclusion of motorcycles.

The impact of legislated and policy positions in key export markets will have a significant effect on local manufacturing. How can the industry use the transition to NEVs and low carbon manufacturing to boost its regional and global value proposition? Can government develop innovative incentive schemes to lower the cost of ownership and support adoption?

Opportunities in the rest of Africa for NEVs.

Continentially the movement towards NEVs in the delivery and public transport sector has been encouraging and highlights the potential for growth and adoption across the continent. What are the current policy tools driving NEV adoption in the ROA and how can South Africa and the IDC leverage the opportunities? What are the market structures in place for the different NEV segments in ROA?

As a regional player, South Africa competes against a few African countries such as Egypt and Morocco for the manufacturing of ICEV and recently for NEVs. What measures and support have these other countries put in place and what can we do differently to position South Africa as the key NEV regional hub. Are there any markets that South Africa can potentially target outside of Africa and developed countries where comparative advantage exists for exports.

Cross Pollination Opportunities.

South Africa has exciting capabilities in manufacturing non-commercial and specialised vehicles, machinery and tooling, soft infrastructure, manufacturing of electrical components used in heavy industry and mining. Many of these capabilities could potentially be used to manufacture NEVs for industrial end users and have spill over effects for the new and traditional NEV segments. Understanding these capabilities may be key to unlocking the localisation of NEVs for specialised applications and componentry.

Localisation of NEVs in micro, e-mobility, industrial and/or public transport segments (Pre-Feasibility study).

Localisation and jobs creation will be pivotal for the transition to cleaner "tail pipe" fuel technology. Manufacturing also has to be undertaken under green manufacturing principles such as using renewable energy. It will be important to understand the factors driving the

localisation and high-level cost implications of setting up a manufacturing facility for the making of different types of NEVs in a multi – OEM production set up.

The aforementioned objectives should therefore provide a sufficient basis for the development of an IDC NEV strategy and investment blueprint and recommendation on the role that development finance can play in supporting the industry and government with the NEV and just energy transition for the transport sector.

Phase 1: Value Chain Analysis

Stage 1: Project Inception:

- Upon appointment, the service provider will be required to commence by drafting an inception report that will detail the overall approach, methodology, details execution plan and expected timeframe in which each phase of the project activities will be completed, and the related estimated costs and resources required.
- The inception report will be a reference document and the basis for the detailed approach which will be agreed upon and subject to amendment by the Project Steering Committee and Service Provider during the project.
- The inception report is an interim deliverable and is expected to be completed within the first two (2) weeks from the time of the service provider appointment (signing of SLA).

Stage 2: Literature Review and Situational

Baseline Analysis

- Undertake a literature review on the following: NEV segments and markets (Global, South Africa and Rest of Africa (ROA)), South Africa Automotive Sector, Component Supply Chain by segment, Auxiliary infrastructure and Economic Zones, Sector and Innovation trends, country, policy and political - economy benchmarking, Legislative changes affecting ICEV and incentives for NEVs. Screen and synthesis information for adequacy and identify gaps. Incl. SWOT analysis.
- Identify industry role players and stakeholders, reflecting current and new as the industry transitions from ICEV to NEV and by NEV segments; map the impact the transition will have on the component supply chain and other affiliated industry supply chains. Identify firms that will likely exit and areas for new entrant.

Green Manufacturing & Economic Zones

- Overview of South African economic sectors and their associated emissions contributions.
- Benchmark the South African Automotive Sector against other regional manufacturing hubs that are transitioning in terms of competitiveness and GHG emissions.
- Infrastructure and SEZs: Overview and landscape assessment, automotive supply chain clusters, highlight investment requirements for decarbonisations and logistics.

Trade, Policy, and Conformity Standards

- Review country-based incentive & tax schemes for NEVs by segment.
- Analysis of trade and non-tariff barriers such as the EU carbon border taxes, their impact on exports and what can we learn from these countries to support our local industry.
- Identify potential markets for exports of NEVs.
- Review of local and international conformity standards for NEVs (incl. components) and how they will impact the sector. Identify any gaps or opportunities for harmonisation, testing and/or non-trade tariffs barriers.
- Develop incentive schemes for segments relative to global best practices and local constraints.

New Energy Vehicles

- Identify best global practice models for NEVs that have been implemented, in development or being monitored and how they can be applied to our industry.
- Overview of sector innovation and technology trends and identify any competitiveness gaps/bottlenecks across the supply chain. Review other country programmes and identify potential synergies and partnerships to pursue.
- Review the NEV landscape in the Rest of Africa (ROA) in terms of industry players and stakeholders, policy developments, investments and potential competitive advantages, component after-market and threats to South Africa. Identify cooperative and synergistic opportunities for South African OEMs.
- Map the NEV components value chain components and identify opportunities at a bill of material (BOM) level for each segment and draw linkages to South Africa's current capabilities and raw materials.
- Charging infrastructure associated with NEVs by segment and put forward a roadmap for private and public sector rollout.
- The impact on various vehicle ownership models and how this will impact industry ownership structures and financial products.
- Develop detailed scenarios and pathways for the industry to transition. High-level investment case (DFIs, Gov. & Private Sector).
- Identify and map who is funding NEV investments and the type of funding instruments used. Furthermore, develop a financing framework to support investments in NEVs.
- Set the scene for a winning NEV transition and decarbonisation strategy to further develop in the next phases.

Stage 3: Economic Modelling

Develop a modelling tool (preferable in Microsoft Excel) that simulates the effects of the transition from ICEV to NEVs. The envisaged outputs include, but are not limited, to the following:

- Macroeconomic and trade indicators (GDP, vehicle imports and exports, contribution to exports).
- Fuel Demand Impact (imports, local refineries sales, petrol & diesel).

- GHG / CO₂ emissions (scope 1, 2, 3) by vehicles type, drive train, energy source and component supply chain.
- Developmental indicators (jobs by sector - direct/indirect).
- Supply chain impacts (number of firms, supply chain structure).
- Impact of component Imports vs localisation.
- Change in vehicle class mix from ICE to NEV.
- Demand and supply-side incentives required by the NEV segment.
- Total cost of ownership (TCO) by segment.
- Energy storage capacity – on road, battery pack, cell manufacturing, recycling.

The model should have a dashboard interface and include graphs/graphics for visual analysis.

The model should allow the users to assess the impact of the transition up until 2035-2050 and be based on clear and rational underlying assumption.

Variables to consider include Year, %NEV market share, NEV segment, GDP growth, localisation of key NEV components, Carbon Border Tax Adjustment, Energy cost, Battery Capacity (kWh), Energy Source, Charging models, Drive train type, Recharge Intervals, Daily Mileage, Climate, Energy Carbon intensity, Types of fuels, Lifetime mileage, Battery Value Chain Carbon Intensity, Average Seasonal temperatures etc.

The modelling exercise can commence post the inception stage and a model framework should be presented to the project steering committee within 3 weeks of commencing work. Once the framework is agreed on by parties, the final model will be presented and approved with the final study document and investment report. The draft model framework can make use of data from the passenger and LCV – MCV markets.

Stage 4: Stakeholder Engagement

- Conduct wider industry consultation with key stakeholders in the Global, South African and ROA markets.
- Using surveys and interviews, triangulate results from situational analysis and economic model.
- Assess the industry readiness to transition and identify opportunities for investment.
- Develop a detailed pipeline of potential NEV investments, which should cover SA and ROA.
- Identify practical challenges, gaps and gate keepers and recommend mechanisms to address issues.
- Identify potential international partnerships for key NEV component localisation and development of innovation and technology development.
- Finalise mapping the automotive and NEV transition ecosystem.

Stage 5: Strategy and Investment Report

Develop a NEV strategy and investment value chain proposition for the IDC. The strategy should cover recommendations for each NEV segment and an associated investment value proposition, including investment pipeline. The strategy and investments should cover, but not be limited to, the following:

- Identify opportunities by segment for the NEV transition and put forward a plan to grow the industry over the short (<3 years), medium (3 – 5 years) and long term (8-12 years).
- Detailed short, medium, and long-term strategy for key NEV component localisations.
- How to assist local firms negatively affected by the transition such as ICE engine manufacturers etc.
- A clear pathway and investment strategy for decarbonising the automotive value chain and promotion of green manufacturing.
- A clear mitigation strategy for non – tariff barriers.
- A strategy for NEVs in the rest of Africa, including investment strategy for specific countries.
- Detailed NEV policy recommendations for the South Africa and other African countries.
- Detailed opinion and motivation for the inclusion of motorcycles in the current APDP.

Summary of ranked investment value propositions to take forward for pre-feasibility study (phase 2)

A structure opportunities evaluation approach or framework should be developed and approved by the project steering committee prior to ranking investment propositions.

Stage 6: Closeout

The following are the expected outputs to meet the deliverables for this project:

- Project Inception Report (MS Word and PDF)
- Situational Analysis and Baseline Report (MS Word and PDF)
- Macroeconomic, Sustainability and Investment Model (pref. MS Excel)
- Stakeholder Engagement Report (includes Questionnaires and/or Surveys) (MS Word and PDF)
- NEV Strategy and Investment Report (MS Word and PDF)
- NEV situational and strategy presentation for IDC (MS PowerPoint and PDF)
- NEV situational and strategy presentation and report for external stakeholders (MS PowerPoint, MS Word and pdf)
- NEV mobility & sustainability infographic (editable template and PDF)
- Opinion and motivation for the inclusion of motorcycles in APDP (MS PowerPoint and PDF)
- Close out report (MS Word and PDF)

The reports must be presented in appropriate electronic as well as printed format and must be easily accessible and user-friendly. Minutes and other documents emanating from all meetings are general deliverables throughout the duration of the project.

Phase 2: Pre-Feasibility Study

Undertake a pre-feasibility study on the establishment of a Multi-Model OEM Plant for NEVs in a Green Manufacturing SEZ such as the Atlantis SEZ. The study will be based on the outcomes of the investment plan and agreed opportunities identified.

The key pillars to be covered will include, but not limited, to the following:

- Infrastructure,
- Logistics,
- Labour/skills,
- Supporting industries,
- Supply chain and product demand,
- Technical skills,
- Potential Strategic Partners,
- Availability of land,
- Logistics and port infrastructure analysis (incl. storage infrastructure) for exporting vehicles,
- Identification of gatekeepers,
- Identification of developmental areas and investment required, and
- High level investment costs for the plant and associated infrastructure.

Deliverables:

- /pre-feasibility study report with notes of the methodology used;
- Soft copies of the final report;
- Executive summary in Word;
- PowerPoint presentation of the report;
- Four (4) hard copies of the final report; and
- Three (3) copies of a CD/USB version of the Executive Summary and final report

4. Project timelines

The appointed service provider will be required to start with Phase one (1) immediately after award and complete within five (5) months. Phase two (2) services will be provided for a period of three (3) months.

Study Scope (Guideline):

The below table is for illustrative purposes and bidders will be required to provide their own detailed project plan with tasks and associated timelines.

Stages	Tasks	Deliverables	Timeline (weeks)	Cumulative Timeline (weeks)
1	<ul style="list-style-type: none">Kick-off meeting with Steering Committee;Draft an inception report;Present inception report;Review of the inception report;Present Training Plan; andSteercom sign off Inception Report and Training Plan.	Inception Report	2 weeks	2 weeks
2	<p>Situational Analysis & Literature Review:</p> <ul style="list-style-type: none">Draft Literature review report and circulate to Steering Committee;Present Situational Analysis report to Steering Committee; andReview of Situational Analysis and Steering Committee sign-off.	Literature review and Situational Analysis report	4 weeks	6 weeks
3	<p>Macroeconomic modelling and report:</p> <ul style="list-style-type: none">Develop a macroeconomic model in excel for the IDC to model the impact of the NEV transition and localisation;Present model framework to Steering Committee for approval;Present final model to Steering Committee; andProvide a training session to Steering Committee members/ IDC on the model.	Macro-economic analysis and industry transition model (Excel)	3 weeks (Framework) Until the end of phase 1 to complete (Final Model)	9 weeks
4	<p>Industry and stakeholder alignment:</p> <ul style="list-style-type: none">Survey;Interviews; andSite Visits (if necessary). <ul style="list-style-type: none">Draft industry alignment report and circulate to Steering Committee;Present industry analysis to Steering Committee; andReview report and sign off.		4 weeks	13 weeks
5	<p>Strategy and Investment Report:</p> <ul style="list-style-type: none">Finalise Macroeconomic and investment model;Present to Steering Committee and undertake the review process; and		3 weeks	16 weeks

	<ul style="list-style-type: none"> Steering Committee to sign off on the final draft. 			
6	Closeout for Phase 1: <ul style="list-style-type: none"> Steering Committee to sign off on final reports, presentations and models; and Reports/Presentations/Recommendations 		2 weeks	19 weeks
7	Buffer		2 weeks	21 weeks
8	Phase 2: <ul style="list-style-type: none"> Undertake Pre - feasibility Study for identified opportunity; and Undertake a Study Tour (if required). Present Preliminary findings to IDC; Present draft and final report to the IDC and Strategic Equity Partners; and IDC and/ Strategic Partners to sign off final study report. 		12 weeks	33 weeks

5. Technical evaluation criteria

5.1. Technical Requirements

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

FAILURE TO COMPLY WITH THE REQUIREMENTS FOR 5.1.1 AND 5.1.2 AND PRESENTATIONS P1 & P2 WILL RESULT IN DISQUALIFICATION.

5.1.1 BIDDER'S EXPERIENCE: VALUE CHAIN ANALYSIS	Comply	Partially Comply	Not Comply
<p>The bidder must have the following relevant experience:</p> <ul style="list-style-type: none">• Must have undertaken relevant value chain projects both locally and outside the borders of South Africa.• Must have undertaken projects in the automotive sector whether for OEMs, component suppliers or Industry Organisations (NAACAM, NAAMSA). <p>To substantiate, the bidder must provide as a minimum, <u>three (3) relevant references of similar work done in the past seven (7) years</u>. At least one (1) of the three (3) references must be for projects undertaken outside the borders of South Africa.</p> <p>Please refer to Table (a) of Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.1.2 BIDDER'S EXPERIENCE: PRE-FEASIBILITY STUDIES	Comply	Partially Comply	Not Comply
<p>The bidder must show relevant experience in Pre-Feasibility Studies within the automotive and related industries such as manufacturing, by demonstrating the following:</p> <ul style="list-style-type: none"> • The ability to develop investment plans and undertake feasibility studies by presenting a minimum of two (2) Pre-Feasibility studies undertaken using the following suggested outline: Marketing, Technical, Financial, Modelling, and attracting Strategic Partners / Strategic Equity Partners (SEP). • Demonstrate key relationships with industry players, local, regionally & international. • Demonstrate the ability to prepare and present pitch decks/value propositions (minimum of two (2) examples must be provided). • Demonstrate their ability to look at multiple Specific investment opportunities (SIO) within a pre-feasibility study. <p>To substantiate, the bidder must provide as a minimum, <u>three (3) relevant references and accompanying executive summaries</u> of pre-feasibility study projects completed in the past seven (7) years based on the above bullet points.</p> <p>Please refer to Table (b) of Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.1.3 BIDDER'S PROPOSED METHODOLOGY AND PROJECT PLAN	Comply	Partially Comply	Not Comply
<p>The bidder must demonstrate a thorough understanding of the objectives and deliverables of this project.</p> <p>The bidder must provide a detailed proposal of the methodology/ approach to be used to carry out the scope of work outlined above, related timelines / project plan and clearly demonstrate how the deliverables will be achieved.</p> <p>The timelines should clearly outline phase 1 (to be concluded within 19 weeks) and phase 2 (to be concluded with 12 weeks).</p>			
Substantiate / Comments			

5.1.4 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE TEAM LEADER	Comply	Partially Comply	Not Comply
<p>The proposed team leader is required to have a minimum of seven (7) years practical and technical experience in Value Chain, Policy Development and/or Automotive Sector. Team leader to also have strong leadership qualities and the ability to communicate effectively. The team leader is also required to have a post graduate qualification in Economics/Econometrics or related disciplines, preferably with a Master's Qualification (Economics/MBA) and/or Engineering/Science degree. Alternately post graduate qualification in Supply Chain Management/Marketing and Senior Management position at a Global OEM. Team leader experience and competency to include:</p> <ul style="list-style-type: none"> • Minimum 40% of projects or previous work undertaken for the private sector; • Experience with decarbonization issues and e-mobility; • Understanding of Climate and Development Finance; • Track record of undertaking similar assignments and coordinating programs and teams; • Strong understanding of the South African automotive sector and APDP programme; and • High attention to detail and ability to prioritize workload, multi-task and work to tight deadlines. <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • CV of the team leader that clearly highlights qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. • CV(s) limited to a maximum of 4 pages. <p>Please refer to Table (c) Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.1.5 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE MODELLING SPECIALIST	Comply	Partially Comply	Not Comply
<p>The bidder's proposed Modelling Specialist is required to have the following:</p> <ul style="list-style-type: none"> • Master's degree in economics/Econometrics; • Minimum of eight (8) years working experience as an Economist; • Experience in Macroeconomic and Climate modeling; • Demonstratable experience in similar projects; • Experience with climate and sustainability initiatives; • Proficiency with Excel, developing dashboards and forecasting models, and Microsoft Projects. • Experience with statistical software; • Experience working with macro-economic data; and • Access to macro-economic data bases such as easy data. <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • CV of the Modelling Specialist which clearly highlights qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. • CV(s) limited to a maximum of 4 pages <p>Please refer to Table (c) Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.1.6 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE STRATEGY DEVELOPMENT/PLANNER OR PROGRAMME MANAGER	Comply	Partially Comply	Not Comply
<p>The bidder's proposed Strategy Development/Planner or Programme Manager is required to have the following:</p> <ul style="list-style-type: none"> • Relevant Honours Qualification in Economics/Industrial Organisation/Engineering/Strategy. Preferably a Master of Business Administration; • Minimum of five (5) years' experience in Strategy or Planning; • Provide a minimum of two (2) reference projects in developing value chain strategies for automotive and related sectors; • Provide a minimum of three (3) reference projects undertaken in Value Chain and Policy development Analysis. • Minimum of two (2) years' experience as an industry analyst at an established consulting firm or similar organization; • Experience working in the areas of sustainability, climate change, automotive industry, electric vehicles, and mobility; Understanding of Climate and Development Finance; Working experience in regional value chains; Experience in implementation, monitoring and reporting of strategies and programmes, Understanding of international trade and trade agreements, knowledge of South African macroeconomic policies, and knowledge of public sector procurement policies; and • Good analytical, writing and communication skills, high attention to detail and ability to work to tight deadlines, good analytical, writing and communication skills, and strong administration skills. <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • CV of the Strategy Development/Planner or Programme Manager which clearly highlights qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. • CV(s) limited to a maximum of 4 pages. <p>Please refer to Table (c) Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.1.7 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE AUTOMOTIVE OR MOBILITY SPECIALIST	Comply	Partially Comply	Not Comply
<p>The bidder's proposed Automotive or Mobility Specialist is required to have the following:</p> <ul style="list-style-type: none"> • Relevant tertiary qualification in Economics/Science or Engineering; • A minimum of seven (7) years' experience in the Automotive Sector; • Expert understanding of the South African Automotive Master Plan and Policy Tools, Involvement in the development and implementation of the South African Automotive Master Plan 2035, Involvement in mobility initiatives in Sub-Sahara Africa, Understanding of the impact of the decarbonization of the transport sector on NDC deliverables for South Africa, Understanding of the automotive component and assembly supply chains, and Ability to undertake technical and project costing for feasibility studies. • Strong administration skills, good analytical, writing and communication skills. <p>The bidders must submit, as part of its proposal, the following:</p> <ul style="list-style-type: none"> • CV of the Automotive or Mobility Specialist which clearly highlights qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. • CV(s) limited to a maximum of 4 pages. <p>Please refer to Table (c) Annexure 5 of this document for the format in which the required information must be provided.</p>			
Substantiate / Comments			

5.1.8 PRESENTATIONS

Shortlisted bidders will be invited for a presentation. The presentation must include but not limited to the following:

	Presentations	Maximum Points
P1	Previous Pre-Feasibility Studies Completed	3
P2	Bidder's Relevant Experience	3
P3	Proposed Methodology and Project Plan	2
P4	Qualifications, Skills, and Experience of Key Personnel	2

SECTION 3: PRICE PROPOSAL

SECTION 3: Cost Proposal

1. **NOTE: All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR).**

2. Are the rates quoted firm for the full period of the contract?

YES	NO
-----	----

Important: If not firm for the full period, provide details of the basis on which price adjustments shall be applied e.g., CPI etc.

3. All additional costs associated the bidder's offer must be clearly specified and included in the Total Bid Price.

4. Is the proposed bid price linked to the exchange rate?	Yes	No
<i>If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:</i>		

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

6. The IDC reserves the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 02 of 2016/2017: Cost Containment Measures which took effect from 01 January 2014, where relevant. The bidder must indicate if their proposed rates are in line with the provisions of the referenced National Treasury Instruction: Cost Containment Measures.	Comply	Not Comply
Substantiate / Comments		

7. COSTING MODEL

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Total Cost (VAT Excl.)
PHASE ONE: VALUE CHAIN ANALYSIS				
PROJECT INCEPTION				
BASELINE ANALYSIS				
GREEN MANUFACTURING & ECONOMIC ZONES				
TRADE, POLICY, AND CONFORMITY STANDARDS				
NEW ENERGY VEHICLES				
ECONOMIC MODELLING				
STAKEHOLDER ENGAGEMENT				

Activity/ Deliverable	Resource(s)	Rate/Hour per resource	Number of hours	Total Cost (VAT Excl.)
STRATEGY AND INVESTMENT REPORT				
CLOSEOUT				
PHASE TWO: PRE-FEASIBILITY STUDY				
DISBURSEMENTS				
TOTAL BID PRICE (VAT EXCL.)				
VAT at 15% (If Applicable)				
TOTAL BID PRICE (VAT INCL.)				

NOTES: ALL TRAVEL ARRANGEMENTS ASSOCIATED WITH THE PROVISION OF THE SERVICES WILL BE MADE THROUGH THE IDC TRAVEL OFFICE AS PER THE IDC TRAVEL POLICY.

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

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

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

8. SUMMARY OF THE PROPOSAL

DESCRIPTION	BIDDER’S PROPOSAL
Number of resources (personnel)	
Project duration (in hours)	
Project duration (in months)	

Price Declaration Form

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, RFP no. **T28/07/23**, the General Conditions, and all other Annexures to the RFP Document, we offer for Electric Mobility Transition and Localisation as specified in this RFP document.

R..... (Including VAT)

In words

R..... (Including VAT)

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

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

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

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

SIGNED

DATE

(Print name of signatory)

Designation

**FOR AND ON BEHALF
OF:**

COMPANY
NAME

Tel No

Fax No

Cell No

SECTION 4: ANNEXURES

Annexure 1: Acceptance of Bid Conditions and Bidder's Details

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

Name of Authorised Signatory _____

Position of Authorised Signatory _____

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

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

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

Bidders are required to be registered on the Central Supplier Database (CSD) of National Treasury. Failure to submit the requested information may lead to disqualification. Bidders are therefore required to submit as part of this proposal both their CSD supplier number and CSD unique registration reference numbers below:

Supplier Number	
Unique registration reference number	

BIDDING STRUCTURE

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

REQUIRED INFORMATION

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

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

If bidder is a Prime Contractor using Sub-contractors, indicate the following:	
Prime Contractor	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cellphone Number	
Fax Number	
Email address	
Postal Address	
Physical Address	

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

Annexure 2: Tax Compliance Requirements

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

SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	
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Annexure 3: 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 ⁸ in the enterprise,

employed by the state?

YES/NO

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

⁸ 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 consortium⁹ will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements, or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

⁹ 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 4: 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.]

4.1 Shareholders/ Members

Name of the shareholder	ID Number	Race	Gender	% Shares

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

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

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

4.3 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 5: Response Format for Section 2

Bidder's Experience and the proposed Project Team

Request for Proposal No:

Name of Bidder:

Authorised signatory:

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

The bidder must provide the following information:

Table (a) Details of the bidder's experience in Value Chain Analysis Projects (please refer to Section 2 par 5.1.1):

[illegible]

Table (b) Details of the bidder's experience in Pre-Feasibility Studies Projects (please refer to Section 2 par 5.1.2):

[illegible]

Table (c) Details of the key personnel of the bidders' proposed team: (please refer to par 5.1.3 - 5.1.7 of Section 2 of this RFP document):

[illegible]

Annexure 6: BEE Commitment Plan

The IDC encourages existing vendors and prospective bidders to support the objectives of B-BBEE and as far as possible strive to improve their B-BBEE contribution status. For bid evaluation purposes, bidders are allocated points in terms of a preference point system based on the Specific Goals which requires the bidder to have a valid B-BBEE certificate or a sworn affidavit in case of a EME or QSE.

Bidders are therefore required to submit a B-BBEE improvement plan in view of the new B-BBEE Codes of Good Practice. Bidders must indicate the extent to which their ownership, management control, employment equity, preferential procurement and enterprise development will be maintained or improved over the contract period in the event that they are successful in this bid process.

Annexure 7: Disclosure Statement

In terms of the tender condition 8.6, which allows the IDC to conduct background checks on bidders and its shareholders and directors, the IDC hereby requires bidders to provide the following additional information:

- 7.1 The IDC considers the integrity of its appointed service providers to be of critical importance. The IDC reserves the right to disqualify from further consideration, any bidder whose integrity, based on past conduct (during the 5 years immediately preceding the bid submission date), it considers questionable.
- 7.2 To this end, the IDC requires each bidder to include in its bid, a disclosure statement which details the following (with 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):
 - 7.2.1 any criminal charges made against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct;
 - 7.2.2 any civil proceedings initiated against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct; and
 - 7.2.3 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.
- 7.3 Where the bidder is a consortium, the disclosure statement referred to in paragraph 9.2 above must be made separately in respect of each consortium partner.
- 7.4 In the event that the bidder's circumstances change, after submission of its bid, regarding any matter referred to in paragraph 9.2 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.
- 7.5 The IDC reserves the right to seek such additional information from any bidder, in respect of the disclosure statement referred to in paragraph 9.2 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.
- 7.6 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 to disqualify a bidder from further participation in the tender process. Disqualification on this ground may be done at any stage in the bid evaluation process prior to contract award.

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

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

Protecting personal information is important to the Industrial Development Corporation (IDC). To do so, IDC follows general principles in accordance with applicable privacy laws and the Protection of Personal Information Act 4 of 2013 (POPIA).

IDC's role as a responsible party, is amongst others to process personal information for the intended purpose for which it was obtained and in line with legal agreements with its respective/ prospective clients, third parties, suppliers, and operators.

Who is an Operator? A person or body/ entity which processes personal information for the IDC in terms of a contract or mandate.

Who is a Supplier? a natural or juristic person that provides a product or renders a service to the IDC. A supplier could also be considered as an operator, an independent responsible party or (together with IDC) a joint responsible party.

If the supplier or business partner provides IDC with its related persons' personal information, the supplier or business partner warrants that the related persons are aware of and have consented to the sharing and processing of their personal information with/by IDC. IDC will process the personal information of related persons as stated under a contractual agreement or as required by any related legislation.

Examples of the personal information of the supplier or business partner where relevant may include (but are not limited to): financial information, including bank statements provided to the IDC; · invoices issued by the supplier or business partner; the contract/ legal agreement between the IDC and the supplier or business partner; other identifying information, which includes company registration numbers, VAT numbers, tax numbers and contact details; marital status and matrimonial property regime (e.g. married in community of property); nationality; age; language; date of birth; education; financial history; identifying numbers (e.g. an account number, identity numbers or passport numbers); email address; physical address (e.g. residential address, work address or physical location); information about the location (e.g. geolocation or GPS location); telephone numbers; online and other unique identifiers; social media profile/s; biometric information (like fingerprints, facial recognition signature; race; gender; sex; criminal history).

Example of Special personal information is personal information about the following: · criminal behaviour, or any proceedings in respect of any offence allegedly committed by a data subject or the disposal of such proceedings; religious and philosophical beliefs; trade union membership; political beliefs; health, including physical or mental health, disability, and medical history; or biometric information (e.g., to verify identity).

RESPONSIBILITIES OF SUPPLIERS AND BUSINESS PARTNERS WHO ARE OPERATORS UNDER POPIA

Where a supplier or business partner, in terms of a contract or mandate, processes personal information for the IDC and is considered an operator of the IDC, the supplier or the business partner will be required to adhere to the obligations set out in the IDC data privacy or POPIA policy. This policy sets out the rules of engagement in relation to how personal information is processed by suppliers and business partners on behalf of the IDC as well as the minimum legal requirements that IDC requires the suppliers and business partners to adhere to, including compliance with POPIA as summarised in the below table.

Item	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	Yes	No
8.1	Accountability 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.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.2	Processing Limitation The respective clients, third parties, suppliers and operators and its members will ensure that information is only processed for the justifiable reason and processing is compatible with the purpose of the collection.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.3	Purpose Specification All respective clients, third parties, suppliers and operators and its members will process personal information only for specific, explicitly defined, and legitimate reasons. The respective clients, third parties, suppliers and operators will inform IDC of reasons prior to collecting or recording their PI.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.4	Further Processing Limitation 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.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.5	Information Quality 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.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
8.6	Open Communication 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"/>
8.7	Security Safeguards It is a requirement of POPIA for responsible parties, business partners and operators to adequately protect personal information. IDC will need to review suppliers or business partner security controls and processes to ensure that personal Information is compliant with the conditions of the lawful processing of personal information as set out in the POPIA. This would be a continuous monitoring and review that will be conducted by the IDC at its discretion.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Item	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	Yes	No
8.8	Data Subject Participation 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