



INDUSTRIAL DEVELOPMENT CORPORATION

APPOINTMENT OF PANELLISTS TO FACILITATE RESOURCE EFFICIENCY ASSESSMENTS AND MANAGE IMPLEMENTATION OF INTERVENTIONS OR PROVIDE INSTALLATION SERVICES FOR RESOURCE EFFICIENCY INTERVENTIONS IN THE TOURISM SECTOR

RFP number	T38-07-26
Issue date	17 July 2026
Closing date and time	31 July 2026
Tender validity period	180 days from the closing date and time
Responses to this RFP should ONLY be forwarded to:	https://idcza-my.sharepoint.com/:f:/g/personal/moitlisim_idc_co_za/IgDCeX3JkmkeSZKXc4TE36loAT9xpqG_kaHq_UL4p58icmQM

NB: All enquiries regarding this RFP must be forwarded to the Procurement Specialist Luyanda Sibali at luyandas@idc.co.za within three (3) days after the RFP has been issued. No enquiries from bidders will be entertained after the closing date of this RFP and during the subsequent evaluation processes. IDC however reserves the right to clarify any information with any bidder regarding their response to this RFP.

TABLE OF CONTENTS

SECTION 1: GENERAL CONDITIONS OF BID	3
1. PROPRIETARY INFORMATION	4
2. ENQUIRIES	4
3. BID VALIDITY PERIOD	4
4. INSTRUCTIONS ON SUBMISSION OF BIDS	4
5. PREPARATION OF BID RESPONSE	5
6. SUPPLIER PERFORMANCE MANAGEMENT	5
7. ENTERPRISE AND SUPPLIER DEVELOPMENT	6
8. IDC'S RIGHTS	6
9. UNDERTAKINGS BY THE BIDDER	6
10. REASONS FOR DISQUALIFICATION	7
11. RETURNABLE SCHEDULES	7
12. EVALUATION CRITERIA AND WEIGHTINGS	8
13. PROMOTION OF EMERGING BLACK OWNED SERVICE PROVIDERS	11
SECTION 2: FUNCTIONAL REQUIREMENTS SPECIFICATION	12
1. SPECIAL INSTRUCTIONS TO BIDDERS	13
2. BACKGROUND INFORMATION	13
3. SCOPE OF WORK/TERMS OF REFERENCE	13
4. REGIONAL PRESENCE	14
5. PROJECT TIMELINES	17
6. TECHNICAL EVALUATION CRITERIA	17
SECTION 3: COST PROPOSAL	24
SECTION 4: ANNEXURES	28
ANNEXURE 1: RESPONSE FORMAT FOR SECTION 2	29
ANNEXURE 2: ACCEPTANCE OF BID CONDITIONS AND BIDDER'S DETAILS	33
ANNEXURE 3: TAX COMPLIANCE REQUIREMENTS	35
ANNEXURE 4: BIDDER'S DISCLOSURE	36
ANNEXURE 5: SHAREHOLDERS AND DIRECTORS INFORMATION	38
ANNEXURE 6: BEE COMMITMENT PLAN	39
ANNEXURE 7: DISCLOSURE STATEMENT	40
ANNEXURE 8: PRIVACY & PROTECTION OF PERSONAL INFORMATION ACT 4 OF 2013 REQUIREMENTS	41

SECTION 1: GENERAL CONDITIONS OF BID

SECTION 1: GENERAL CONDITION 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 submitted **in writing** to:

Name: **Luyanda Sibali**

Telephone Number: Office: **011 269 3385**

Email address: luyandas@idc.co.za

- 2.2. Enquiries in relation to this RFP will not be entertained after **22 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) 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

- 3.1. Responses to this RFP received from bidders will be valid for a period of **180** days counted from the bid closing date.

4. INSTRUCTIONS ON SUBMISSION OF BIDS

- 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 **31 July 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/IqDCeX3JkmkeSZKXc4TE36loAT9xpgG_kaHqUL4p58icmQM
- 4.4. Bids sent to any other email address other than the one specified herein will be disqualified and will not be considered for evaluation. It is the bidder's responsibility to ensure that the bid is sent to the correct email address and that this is received by the IDC before the closing date and time in IDC's dedicated tender e-mail inbox / address https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/IqDCeX3JkmkeSZKXc4TE36loAT9xpgG_kaHqUL4p58icmQM
- 4.5. 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 e-mail servers are configured to receive e-mails with sizes up to 50MB.
- 4.6. The IDC will not be held responsible for any of the following:

- 4.6.1. bid responses sent to the incorrect email address.
- 4.6.2. bid responses being inaccessible due to non-standard electronic file formats being utilised to submit responses by bidders.
- 4.6.3. any security breaches and unlawful interception of tender / bid responses by third parties outside the IDC's IT network domain.
- 4.6.4. bid responses received late due to any IT network related congestions and/or technical challenges; and
- 4.6.5. bid responses with file size limits greater than IDC's e-mail receipt capacity of 50MB.
- 4.7. Only responses received via the specified email address will be considered.
- 4.8. Where a complete bid response (Inclusive of all relevant Schedules) is **not received** by the IDC in its electronic email tender box [GET THE LINKhttps://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/IqDCeX3JkmkeSZKXc4TE36loAT9xpgG_kaHqUL4p58icmQM](https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/IqDCeX3JkmkeSZKXc4TE36loAT9xpgG_kaHqUL4p58icmQM)
- 4.9. 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.**
- 4.10. Amended bids may be sent to the electronic tender box https://idcza-my.sharepoint.com/:f/g/personal/moitlisim_idc_co_za/IqDCeX3JkmkeSZKXc4TE36loAT9xpgG_kaHqUL4p58icmQM
- 4.11. **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

- 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

- 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

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 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

- 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:
- 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.
 - 10.1.7. bidder, as the prime contractor, who holds a lower percentage in terms of the value of the contract than any of its subcontractor/(s).

11. RETURNABLE SCHEDULES

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

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. Technical Requirement evaluation Resource Efficiency Assessors

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: RESOURCE EFFICIENCY ASSESSORS	WEIGHT
Bidder's experience	35
Qualifications, skills, and experience of the team leader	25
Qualifications, skills, and experience of the proposed personnel (team members)	25
Bidders proposed approach/methodology	10
Bidders project plan and report writing	5
TOTAL	100

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.

12.2.2. Technical Requirement evaluation for the installers of the energy efficiency intervention

ELEMENT: SERVICE PROVIDERS (INSTALLERS)	WEIGHT
Bidder's experience	60
Qualifications, skills, and experience of the proposed personnel (team members)	40
TOTAL	100

Note: The minimum qualifying score for functionality is 70%. All bidders that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and Specific Goals.

12.3. Phase 3: Preference Point System

All bids that achieve the minimum qualifying score for Functionality (acceptable bids) in the respective panel (either Assessors or Installation Service Providers) will be evaluated further in terms of the preference point system, as follows:

CRITERIA FOR ASSESSORS	POINTS
Price	80
Specific Goals ¹	20
TOTAL	100

CRITERIA FOR INSTALLATION SERVICES	POINTS
Price	90
Specific Goals ¹	10
TOTAL	100

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

SPECIFIC GOALS FOR ASSESSORS	POINTS
	(80/20 system)
Black ownership ²	10
30% Black women ownership	4
Any % of ownership by Black Designated Groups ³	2
Reconstruction Development Programme Objective: Promotion of SMMEs (Entities that are EME or QSE)	4
TOTAL POINTS	20

Black ownership: 100% black owned entities will score the full 10 points if 80/20 system, and between 51% - 99.99% black owned entities will score 4 points (if 80/20 System).

³Black 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

SPECIFIC GOALS FOR INSTALLATION SERVICES	POINTS
	(90/10 system)
Black ownership ²	5
30% Black women ownership	2
Any % of ownership by Black Designated Groups ³	1
Reconstruction Development Programme Objective: Promotion of SMMEs (Entities that are EME or QSE)	2
TOTAL POINTS	10

²Black ownership: 100% black owned entities will score the full 5 points if 90/10 system, and between 51% - 99.99% black owned entities will score 2 points (if 90/10 System).

³Black 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

12.4. Phase 4: Objective Criteria

This contract will be awarded to the bidder scoring the highest points unless an objective criterion justifies the award of the tender to a bidder other than the highest scoring bidder.

12.4.1 Objective Criteria are:

The bidder must pose less risk to the IDC. The risk will be assessed in terms of, but not limited to, the following:

- Reputational Risk: This will be assessed in line with the bidder's disclosure (Refer to Annexure 7: Disclosure statement of this document) 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.

1. 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

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

- 2.1. The Industrial Development Corporation (IDC) seeks to appoint one panel that will consist of assessors and service providers (installers) who will be responsible for the installation of energy efficiency interventions. The breakdown of the categories is as follows:

Assessors to manage the process of conducting resource (energy and water) efficiency assessments, managing the installation process, verifying the quality and adequacy of the installed interventions and reporting on post-installation savings, as well as monitor the system performance for at least 6 months post-installation.

Service providers for the installation of the energy efficiency interventions under the same programme.

The panel of assessors and the panel of installation service providers will be expected to work together to deliver on the output requirements. This will be for the Green Tourism Incentive Programme (GTIP or the Programme), an initiative by the Department of Tourism whose key objective is encouraging privately-owned tourism enterprises to implement responsible tourism practices utilising cleaner and renewable energy sources and the efficient utilisation of water. The GTIP provides grant funding support to qualifying Exempted Micro and Qualifying Small (up to R45 million annual revenue) tourism enterprises.

3. SCOPE OF WORK/TERMS OF REFERENCE

- 3.1. The appointed assessors will be required to provide the following services:

3.1.1. Energy and Water Efficiency Assessments

- Visit eligible tourism establishments to perform resource (energy and water) efficiency assessments.
- Submit to the IDC a resource efficiency audit report that contains:
 - Identified energy and water efficiency opportunities for the establishment;
 - Recommendation of energy and water efficiency solutions to be funded by the Programme;
 - Projected costs for implementing identified resource efficiency solutions;
 - Energy and water savings to be achieved as a result of implementing the recommended solutions; and
 - The basis for arriving at the savings to be achieved.

3.1.2. Installation Verification

- Verification and reporting that installations were done in accordance with the recommendations of the assessment/audit reports and industry good practises.

3.1.2.1. Post-Installation Monitoring and Verification (Savings)

- Monitor the system performance for 6 months post-installation.
- Verification and reporting on energy and/or water savings being achieved by each beneficiary post implementation of approved interventions.

3.2. The appointed service providers for the installation will be required to provide the following services:

3.2.1. Service Provider – Installations

- Required to work with the consultant to design the most appropriate systems for intended purpose.
- Install identified systems in line with recommendations from the consultants.
- Ensure adequate training and operational assistance is provided to applicants.
- Monitoring performance of installed systems for at least 6 months after installation.
- Provide industry standard warranties.

The required services have been categorised as reflected below. Bidders must indicate in the table below, with a **tick (✓)** the categories the bidder is bidding for.

Panel type	Please Tick
1. Assessors: Energy and Water Efficiency Assessments	
2. Service Provider: Installers	
2.1 Energy efficiency e.g. solar PV systems (PV panels, hybrid inverters, battery storage systems, monitoring systems), solar geysers, heat pumps, air conditioners, gas geysers, LED lights, electricity metering, energy monitoring systems/ smart metering systems	
2.2 Water efficiency e.g. water storage tanks, water filtration systems, grey water recovery systems, rain water harvesting systems, tap aerators, dual flush toilets, water metering	

Note: Bidders must ensure that they provide the required response/ information to the evaluation criteria for each service category the bidder is bidding for.

4. REGIONAL PRESENCE

The IDC seeks to appoint a panel of assessors as well as a separate panel of service providers from each province in order to promote efficiency on the work to be done. Assessors and service providers must indicate their office presence across the country so that no extensive travel costs are expended for travel from province to province. Therefore, if you indicate that you have presence in Eastern Cape for example, it is assumed you have an operational office, and no additional travel expense will be incurred to travel from one province to another.

Bidders are required to clearly indicate with a **tick (✓)** the province they are applying for and provide the physical address from where they operate from.

PROVINCE	PLEASE TICK (✓)	PHYSICAL ADDRESS
Eastern Cape		
Free State		
Gauteng		
KwaZulu-Natal		
Limpopo		
Mpumalanga		
North-West		
Northern Cape		
Western Cape		

5. ENGAGEMENT MODEL

For fair, transparent and equitable work distribution, the following process will be followed:

5.1. Assessors:

5.1.1. Fixed Rate

- A fixed rate, as determined by the IDC, will apply to all appointed assessors for assessment work undertaken under this panel based on the quoted bids, available funds and industry standard.
- The fixed rate will be applied consistently to all assessors, irrespective of their ranking, province, or the number of assessments allocated.
- Assessors will not be required to submit competing quotations for each assessment assignment, unless otherwise requested by the IDC for work outside the standard assessment scope.

5.1.2. Allocation of Assessment Work

- Assessment work will be allocated to the appointed assessors (not exceeding 12) primarily according to the geographic location of the beneficiary establishment and the assessor's indicated provincial presence.

- Where more than one assessor is available in the relevant geographic area, the IDC will allocate the assessment based on the assessor's availability, capacity, and ability to complete the assessment within the timeframe required by the IDC.
- The IDC may consider the complexity of the assessment, prior allocations, performance history, and any potential conflict of interest when determining the most suitable assessor for an assignment.

5.1.3. Availability and Timeframes

- Before an assessment is allocated, the IDC may confirm the assessor's availability to commence and complete the assessment within the required turnaround time.
- If an assessor is unavailable or unable to complete the assessment within the required timeframe, the IDC may allocate the assessment to another suitable assessor in the same geographic area or, where necessary, to the next suitable available assessor.
- Acceptance of an assessment allocation will require the assessor to commit to the agreed timelines, deliverables, reporting requirements, and the fixed rate applicable to the work.

5.1.4. Monitoring and Performance Management

- Performance reviews will be conducted periodically to ensure adherence to the SLA, assessment quality standards, agreed timelines, reporting requirements, and responsiveness to IDC instructions.
- Poor performance, repeated unavailability, failure to meet agreed timeframes, or failure to deliver acceptable assessment reports may be considered by the IDC when making future allocation decisions.

5.2. Installation Service Providers:

5.2.1 Ad-hoc Request for Installation Services

- Installation work will be requested from appointed installation service providers on an ad-hoc basis, as and when installation requirements are identified under the Programme.
- The IDC may issue a request to one or more suitable installation service providers, depending on the nature of the required intervention, the geographic location of the beneficiary establishment, and the service provider's indicated area of operation.
- Each request will specify the required installation scope, site location, expected deliverables, and required completion timeframe.

5.2.2 Quotation and Availability Confirmation

- Installation service providers will be required to submit a written quotation and confirm their availability within the period stipulated by the IDC, which may be as little as three (3) days from the date of request.
- The quotation must be based on the scope issued by the IDC and must clearly indicate the proposed price, implementation approach, resources to be deployed, and the proposed timeframe for completing the installation.
- Failure to submit a quotation or confirm availability within the required timeframe may result in the installation service provider being skipped for that allocation and the request being issued to the next suitable service provider in the rotation.

5.2.3 Allocation of Installation Work

- When selecting an installation service provider for a specific assignment, the IDC will consider the geographic location of the beneficiary establishment and the service provider’s indicated provincial presence or operational capacity in that area.
- The IDC will also consider the service provider’s capacity, resources, and ability to complete the installation within the timeframe required by the IDC.
- Where more than one suitable service provider is available, the IDC may consider pricing, availability, capacity, prior allocations, performance history, and any potential conflict of interest before issuing an appointment instruction.

6. PROJECT TIMELINES

The duration of the panel appointment will be for an estimated period of one (1) year, subject to review of the consultants and service provider’s performance. The IDC reserves the right to extend the services under any subsequent contract. The contract is subject to alignment of the GTIP fund management agreement which expires 31 March 2027 (whichever comes first).

7. TECHNICAL EVALUATION CRITERIA

**SECTION 2 (A) TECHNICAL REQUIREMENTS APPLICABLE TO
RESOURCE EFFICIENCY ASSESSORS**

7.1. Other Technical Requirements – Resource Efficiency Assessors

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 BIDDER’S EXPERIENCE	COMPLY	PARTIALLY COMPLY	NOT COMPLY
----------------------------------	---------------	-----------------------------	-----------------------

The bidder must demonstrate relevant experience in successfully performing energy and water efficiency assessments, verification of energy and/or water installations, post-installation monitoring and verification of energy and/or water savings. The assignments or projects must have been completed in commercial dwellings. To substantiate, bidders must submit, as part of its proposal, the following: • A company profile, which details the company's history, service offering, expertise, and location. • A minimum of three (3) similar and/or relevant reference projects completed in the last two (2) years, which are to be accompanied by contactable references/reference letters. All referenced projects completed must be within commercial dwellings. Please refer to Table (a) of Annexure 1 of this document for the format in which the required information must be provided. NOTE: FAILURE TO SUBMIT A COMPANY PROFILE WILL LEAD TO THE BIDDER SCORING LOWER POINTS.			
Substantiate / Comments			

6.1.2 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE TEAM LEADER	COMPLY	NOT COMPLY
The bidder's proposed team leader must have the following qualifications: • a bachelor's degree in Mechanical, Electrical, Civil or Chemical Engineering with at least five (5) years' industrial experience. or • National Diploma in Mechanical, Electrical, Civil or Chemical Engineering with at least eight (8) years industrial experience. The team leader's experience is required to be in the following areas: • Design of renewable and sustainable engineering technologies and application knowledge in developing a Solar PV and/or Wind Power project and/or; • Working knowledge of batteries, panels, and other related energy and water technology products and/or • Design of water efficiency and/or other resource efficiency interventions. To substantiate, bidders must submit, as part of its proposal, the following: • CV of the team leader, which clearly highlight qualifications, areas of experience/ competence relevant to the tasks and objectives of this project as outlined above. • Proof of qualification. • CV(s) limited to a maximum of 4 pages. Please refer to Table (b) Annexure 1 of this document for the format in which the required information must be provided <u>in addition</u> to the requested CVs and proof of qualification.		
Substantiate / Comments		

6.1.3 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE PROPOSED PERSONNEL (team members)	COMPLY	PARTIALLY COMPLY	NOT COMPLY
The bidder's proposed team is required to have extensive skills and experience in performing energy and/or water efficiency assessments, verifying energy, and water installations, monitoring and evaluation of energy and water post-installation savings. To substantiate, the bidder must submit, as part of its proposal, the following: • The structure and composition of the proposed team, clearly outlining the main disciplines/ specialties of this project. • CVs of each team member, which clearly highlight their 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 Please refer to Table (c) Annexure 1 of this document for the format in which the required information must be provided.			
Substantiate / Comments			

6.1.4 BIDDERS PROPOSED APPROACH/METHODOLOGY	COMPLY	PARTIALLY COMPLY	NOT COMPLY
The bidder must demonstrate thorough understanding of the objectives and scope of work for this assignment by providing comprehensive methodologies/approaches to be utilised for all categories of the scope of work (i.e., energy and water assessments, installation verification, post-installation monitoring and verification of savings). The methodology must cover critical aspects that include, but not limited to, the following: • Project Planning; • Project Execution; • Project Reporting; • Quality Assurance; • Safety; • Close-out; and • Stakeholder Management amongst others.			
Substantiate / Comments			

6.1.5 PROJECT PLAN AND REPORT WRITING	Comply	Partially Comply	Not Comply
The bidder must demonstrate competency in project planning and report writing for similar or related projects. The Bidder must provide a comprehensive project plan outlining typical milestone deliverables and timelines related to the work assignments (subcategories) to demonstrate its understanding of the project. Furthermore, the bidder must provide sample reports proposed to be generated as part of each work assignment from inception up to close-out.			
Substantiate / Comments			

SECTION 2 (A) TECHNICAL REQUIREMENTS APPLICABLE TO INSTALLERS

7.2. 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

7.2.1 CERTIFICATE OF COMPLIANCE: ENERGY	Comply	Not Comply
The bidder shall provide evidence that the person responsible for issuing Certificates of Compliance is registered with the relevant regulatory/statutory body and is legally authorised to issue CoCs in terms of applicable South African legislation.		
Substantiate / Comments		

7.2.2 COMPLIANCE: WATER	Comply	Not Comply
The bidder shall confirm compliance with all applicable South African legislation, municipal bylaws, SANS 10252 (Water Supply Installations), and SANS 241 (Drinking Water Quality).		
Substantiate / Comments		

7.3. Other Technical Requirements – Service providers (installers)

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 BIDDERS EXPERIENCE	Comply	Partially Comply	Not Comply
The bidder must demonstrate relevant experience in successfully installing energy and/or water installations, The assignments or projects must have been completed in commercial dwellings. To substantiate, bidders must submit, as part of its proposal, the following: A company profile, which details the company's history, service offering, expertise, and location.			

• A minimum of three (3) similar and/or relevant reference projects completed in the last two (2) years, which are to be accompanied by contactable references. All referenced projects completed must be within commercial dwellings. Please refer to Table (d) of Annexure 1 of this document for the format in which the required information must be provided. NOTE: FAILURE TO SUBMIT A COMPANY PROFILE WILL LEAD TO THE BIDDER SCORING LOWER POINTS			
Substantiate / Comments			
6.2.2 QUALIFICATIONS, SKILLS, AND EXPERIENCE OF THE PROPOSED PERSONNEL	Comply	Partially Comply	Not Comply
The bidder's proposed team is required to have extensive skills and experience in installing energy, and water interventions. To substantiate, the bidder must submit, as part of its proposal, the following: • The structure and composition of the proposed team, clearly outlining the main disciplines/ specialties related this project. • CVs of each team member, which clearly highlight their 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 • Valid Accreditation by relevant statutory body (ECB, ECASA, SAPVIA, SAREC, PIRB, IOPSA, etc.) • Department of Labour Electrical Contractor Registration (where applicable) Please refer to Table (e) Annexure 1 of this document for the format in which the required information must be provided.			
Substantiate / Comments			

SECTION 3: COST PROPOSAL

SECTION 3: COST PROPOSAL

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

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

YES

NO

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

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

4. Is the proposed bid price linked to the exchange rate?

Yes

No

If yes, the bidder must indicate CLEARLY which portion of the bid price is linked to the exchange rate:

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.

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. **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.**

Substantiate / Comments

7. COSTING MODEL

Important Note: The price is for indicative purposes only. Bidders should describe any assumptions and considerations to distinguish between Minimum Cost scenario vs. Maximum Cost scenario. The IDC reserves the right to negotiate a standard rate for required services for appointed service providers' acceptance.

7.1. Assessors

Activity/Deliverable	Number of Human Resource(s)	Minimum Cost per activity/deliverable (VAT Incl.)	Maximum Cost per activity/deliverable (VAT Incl.)
Overall cost of conducting an energy and water efficiency assessment			
Verification of energy and water installations			
Verification and reporting on energy and/or water savings achieved			
Installation Oversight			
Post installation Monitoring			

7.2. Service Providers/Installers

Activity/Deliverable	Number of Human Resource(s)	Minimum Cost per activity/deliverable (VAT Incl.)	Maximum Cost per activity/deliverable (VAT Incl.)
Design and installation of a typical 50 kWp Solar Array PV System with 48 kWh Battery Capacity Requirements (assume standard roof mount system)			
Design and installation of a typical 10 kWp Solar Array PV System with 15 kWh Battery Capacity (assume standard roof mount system)			
Design and installation of a water storage plant which consists of a 10,000-litre tank and a filtration system (make assumption as required to fulfil this, just clearly state them)			

Complete as applicable

PRICE DECLARATION FORM

Dear Sir,

Having read through and examined the Request for Proposal (RFP) Document, **T38-07-26** the General Conditions, The Requirement and all other Annexures to the RFP Document, we offer to facilitate resource efficiency assessments and manage implementation of interventions **or** provide installation services for resource efficiency interventions in the tourism sectors to the IDC, at a total amount of:

R.....
..... VAT incl.)

In words

R.....
..... VAT incl.)

We confirm that this price covers all activities associated with the assessor/installation (cross out whichever is not applicable) services , 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 _____

**FOR AND ON BEHALF
OF:**

COMPANY

NAME _____
Tel No _____
Fax No _____
Cell No _____

SECTION 4: ANNEXURES

Bidder's Experience and the proposed Project Team

The bidder must provide the following information:

[illegible]

Table (b) Details of the bidders' proposed team leader(s) (Refer to Section 2 par 6.1.2):

Name	Position	Project description	Relevant Project Experience				
			Role / Duties in this Project	Client	Project period	Years' Experience	Qualification

Table (c) Details of the key personnel of the bidders' proposed team (Refer to Section 2 par 6.1.3):

Name	Position	Project description	Relevant Project Experience				
			Role / Duties in this Project	Client	Project period	Years' Experience	Qualification

Table (d) Details of the bidder's current and previous experience in conducting energy and water installations (Refer to Section 2 par 6.2.1):

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

Table (e) Details of the bidders' proposed service providers /installers (Refer to Section 2 par 6.2.2):

Name	Department of Labour Electrical Contractor Registration (yes/no/ Please provide certificate)	Accreditation by a relevant Statutory body* (please provide certificate)	Relevant Project Experience			
			Project description	Role / Duties in this Project	Client	Project period

• **Relevant Statutory Body e.g.** (ECB, ECASA, SAPVIA, SAREC, PIRB, IOPSA, etc.

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

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

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

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

CENTRAL SUPPLIER DATABASE (CSD) INFORMATION

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

Supplier Number	
-----------------	--

BIDDING STRUCTURE

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

REQUIRED INFORMATION

If Individual Bidder:	
Name of Company	
Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
cell phone 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	
Cell phone 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	
Cell phone 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	
Cell phone Number	
Email address	
Postal Address	
Physical Address	
Work as a % of the total value of the contract and description of the work	
Sub-contractors	
Name of Company	
Company Registration Number	
Vat registration Number	
Contact Person	
Telephone Number	
Cell phone Number	
Email address	
Postal Address	
Physical Address	
Subcontracted work as a % of the total value of the contract and description of the work	

ANNEXURE 3: TAX COMPLIANCE REQUIREMENTS

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

.....
.....

¹ 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 consortium² 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

² 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.

Documents necessary to verify the Identity of a Trust	☐ Copy of trust deed or other founding document by which trust is created.
	☐ Letters of authority (as issued by the Master of the High Court)
	☐ 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
Total Black Shareholding % as per the current and valid B-BBEE Certificate				

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

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

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
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 ☐	No ☐
2.	Processing Limitation 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.	Yes ☐	No ☐
3.	Purpose Specification 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.	Yes ☐	No ☐
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 ☐	No ☐
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 ☐	No ☐

ITEM	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	YES	NO
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 ☐	No ☐
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 continuous monitoring and review that will be conducted by the IDC at its discretion.	Yes ☐	No ☐
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 ☐	No ☐

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