



INDUSTRIAL DEVELOPMENT CORPORATION

APPOINTMENT OF A SERVICE PROVIDER FOR FEASIBILITY, BUSINESS CASE, ADVISORY AND IMPLEMENTATION READINESS SERVICES FOR THE OPPITOPI RESERVOIR NODE UPGRADE PROJECT IN THE RAMOTSHERE MOILOA LOCAL MUNICIPALITY

RFP number	T54/09/26
Issue date	28 September 2026
Non-Compulsory briefing session	DATE & TIME: 5 October 2026 @ 11H00 VENUE: Microsoft Teams LINK: https://teams.microsoft.com/meet/345906501541843?p=Ep0T5GRvtGCTptnNiq Meeting ID: 345 906 501 541 843 Passcode: w4mq2fY3
Closing date and time	13 October 2026
Tender validity period	120 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/IgDGrTJ0ovdaRKH8aSbtNFXUAcl1qSY

NB: All enquiries regarding this RFQ must be forwarded to the Procurement Specialist josephp@idc.co.za within five (5) days after the RFQ has been issued. No enquiries from bidders will be entertained after the closing date of this RFQ and during the subsequent evaluation processes. IDC however reserves the right to clarify any information with any bidder regarding their response to this RFQ.

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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: **Joseph Phiri**
Telephone Number: Office: **011 269 3810**
Email address: josephp@idc.co.za

- 2.2. Enquiries in relation to this RFP will not be entertained after 16:00pm on **05 October 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 **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 and must be e-mailed to the dedicated portal 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 **13 October 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/IgDGrTJ0ovdaRKH8aSbtNFXUAcl1qSY. 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/IgDGrTJ0ovdaRKH8aSbtNFXUAcl1qSY.
4.4. Bidders are advised to submit / send its bid responses **at least 30 minutes before the 11h00 AM** deadline to avoid any technical challenges in this regard which may result in bid responses being received late. IDC's e-mail servers are configured to receive e-mails with sizes up to 50MB.
4.5. The IDC will not be held responsible for any of the following:
4.5.1. bid responses sent to the incorrect email address.
4.5.2. bid responses being inaccessible due to non-standard electronic file formats being utilised to submit responses by bidders.

- 4.5.3. any security breaches and unlawful interception of tender / bid responses by third parties outside the IDC's IT network domain.
- 4.5.4. bid responses received late due to any IT network related congestions and/or technical challenges; and
- 4.5.5. bid responses with file size limits greater than IDC's e-mail receipt capacity of 50MB.
- 4.6. Only responses received via the specified email address will be considered.
- 4.7. Where a complete bid response (Inclusive of all relevant Schedules) is **not received** by the IDC in its electronic portal by the closing date and time, such a bid response will be regarded as incomplete and late. Such late and / or incomplete bid will be disqualified. **It is the IDC's policy not to consider late bids for tender evaluation.**
- 4.8. Amended bids may be sent to the electronic portal **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. If 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. Mandatory Functional/ Technical Requirements

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

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

12.2.2. 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:

NUMBER	ELEMENT	WEIGHT
1	BIDDER'S RELEVANT EXPERIENCE	30
2	BIDDER'S PROPOSED METHODOLOGY & APPROACH	30
3	BIDDER'S PROPOSED PROJECT PLAN	10
4	QUALIFICATIONS, SKILLS AND EXPERIENCE OF KEY PERSONNEL	30
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) will be evaluated further in terms of the preference point system, as follows:

CRITERIA	POINTS
Price	80
B-BBEE	20
TOTAL	100 points

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

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

²Black ownership: 100% black owned entities will score the full 10 points (if 80/20 system) or 5 points (if 90/10 system), and between 51% - 99.99% black owned entities will score 4 points (if 80/20 system) or 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.

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 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. Background

- 2.1.1. Infrastructure South Africa (ISA) is a central government agency responsible for coordinating and driving the national infrastructure investment programme, with the intent of improving infrastructure investment and delivery. This is accomplished through, inter alia, the development and implementation of high-impact infrastructure projects. ISA derives its legal mandate from the Infrastructure Development Act (IDA). The IDA (Act 23 of 2014) is aimed at fast-tracking regulatory decision-making and speeding up the implementation processes of strategic infrastructure projects. ISA implements its mandate in partnership with project owners.
- 2.1.2. In line with one of the State’s priorities of the seventh administration, namely Priority 6 - A capable, ethical, and developmental state, ISA is cognisant of the need to enhance state capacity. This has necessitated the implementation of the Presidential Infrastructure Coordinating Commission (PICC) Council resolution of November 2024 that approved the implementation of the Adopt a Municipality Pilot Programme (AAM) in four (4) local municipalities, focusing on various sectors including waste management. ISA’s role is to assist the four local municipalities with technical support in developing business cases for identified projects and transaction advisory with the intention of assisting with securing of the programme/project finance and funding.
- 2.1.3. The PICC Technical Task Team, housed within the Industrial Development Corporation (IDC) and operating in support of ISA's infrastructure development objectives, is responsible for advancing strategic infrastructure projects of national importance. Accordingly, the IDC, on behalf of ISA, intends to appoint a suitably qualified and experienced Transaction Advisor (TA) to undertake a comprehensive Bankable Feasibility Study, develop a Business Case, and provide transaction advisory and implementation to develop feasibility, business case, advisory and implementation readiness services for the Oppitopi Reservoir Node project - Ramotshere Moiloa Local Municipality
- 2.1.4. The appointment is intended to support project preparation activities, including feasibility-level assessments, transaction advisory and implementation readiness, with the objective of enabling informed decision-making and facilitating the mobilisation of funding for the implementation of the identified water infrastructure upgrade project in the **Ramotshere Moiloa Local Municipality (RMLM)**.

2.1.5. Ramotshere Moiloa Local Municipality is a Category B3 municipality, which is a local authority falling under the Ngaka Modiri Molema District. As a B3 municipality, it is characterised by predominantly rural economy with agriculture and related service activities forming the main economic base, supported by retail and limited mining activities around the town of Zeerust, serving an estimated population of over 161,600 people across 52,565 households.

2.2. Project Detail – Ramotshere Moiloa Local Municipality

2.2.1. Technical Project Detail: The Oppitopi Reservoir Node

The Oppitopi Reservoir Node functions as the primary hydraulic junction, final treatment center, and bulk storage facility for the Rietpoort-Doornfontein Borehole Scheme. This scheme extracts groundwater from the Rietpoort-Doornfontein dolomitic aquifer and conveys it through a 30 km bulk main to the Oppitopi site, ultimately supplying approximately 9 Ml/day of potable water to Zeerust Town. Zeerust serves as a critical commercial hub and gateway along the N4 Trans-Kalahari Corridor, making its local water security highly dependent on the operational stability of this single node.

The node operates via a sequential two-stage storage and treatment process:

- **Oppitopi Reservoir 1:** Receives raw/partially treated groundwater from the pipeline for secondary chemical dosing to ensure disinfection and strict compliance with SANS 241 potable water quality standards.
- **Oppitopi Reservoir 2:** Receives chlorinated water via a 200-meter interlink pipeline from Reservoir 1 for final bulk balancing. From this point, an electro-mechanical bulk pump station transfers the water directly into the downstream distribution network that charges the Sandvlakte and Bonanza supply reservoirs.

2.2.2. Core Problem Statement and Project Objectives

The Oppitopi Node is experiencing critical technical degradation across several engineering disciplines, resulting in elevated Non-Revenue Water (NRW) losses and operational risks:

- **Asbestos Cement (AC) Materials:** The 200-meter interlink between the reservoirs and extensive segments of the immediate downstream bulk distribution lines consist of aged asbestos cement piping. These components have surpassed their design life, resulting in frequent bursts and presenting an occupational health and environmental safety risk during repairs.
- **Mechanical & Electrical Failure:** The bulk distribution pump sets and motor control centers (MCC) at Reservoir 2 are obsolete, inefficient, and prone to frequent mechanical breakdowns.
- **Process and Monitoring Deficiencies:** Chemical dosing is managed manually, which creates risks of inconsistent disinfection levels. Furthermore, the system lacks telemetry, preventing automated flow tracking, data logging, or active leak detection.

The overarching objective of this assignment is to prepare a bankable, implementation-ready

project package to structurally rehabilitate Reservoirs 1 and 2, decommission and replace high-risk AC pipelines, modernize the electro-mechanical pump station with energy-efficient systems, and integrate automated dosing and telemetry infrastructure.

The PICC Technical Task Team, housed within the Industrial Development Corporation (IDC) and operating in support of ISA's infrastructure development objectives, is responsible for advancing strategic infrastructure projects of national importance.

Accordingly, the IDC, on behalf of ISA, intends to appoint a suitably qualified and experienced Transaction Advisor (TA) to undertake a comprehensive Bankable Feasibility Study, develop a Business Case, and provide transaction advisory and implementation to develop feasibility, business case, advisory and implementation readiness services for the Oppitopi Reservoir Node project - Ramotshere Moiloa Local Municipality.

3. SCOPE OF WORK/TERMS OF REFERENCE

3.1. Scope of work overview

The appointed service provider will be required to advance the project from its current Pre-Feasibility (Early Business Case) stage to complete procurement and funding readiness using the **Five-Case Model** methodology. The scope of work is modular and phased, and the IDC reserves the right to appoint for one or more phases subject to budget availability and performance.

The assignment consists of four interrelated phases:

- **Phase 1: Information Review and Gap Analysis**
Consolidation of baseline asset conditions and validation of operational metrics.
- **Phase 2: Comprehensive Feasibility Study**
Development of detailed technical, environmental, statutory, economic, financial, and institutional engineering assessments, culminating in a preliminary design package.
- **Phase 3 – Transaction Advisory and Implementation Readiness**
Structuring of commercial delivery routes, municipal risk allocations, procurement packaging, and capital funding applications.
- **Phase 4 – Intermediate Business Case Compilation**
Integration of all deliverables into a unified investment dossier for capital approval.

3.2. Detailed scope of work

3.2.1 Phase 1: Information Review and Gap Analysis Report

The service provider must evaluate all historic documentation and define the technical boundaries of the node.

- **Updated Needs Assessment:** Re-evaluate localized water demand curves, storage requirements, and peak pressure parameters for Zeerust Town, accounting for urban growth since the concept stage.

- **Scoping Gap Analysis Report:** Review available structural records for Reservoirs 1 and 2, pump maintenance history, water quality compliance logs, and pipe burst metrics. Identify data deficiencies requiring specialized geotechnical, structural, or topographical field investigations during Phase 2.

3.2.2 Phase 2 - Comprehensive Feasibility Study

The service provider must perform detailed options analyses and technical designs to determine the optimal configuration for the infrastructure upgrades.

- **Technical Feasibility Assessment:** Evaluate engineering interventions for structural concrete repair of the reservoirs, optimal hydraulic sizing for the replacement pipelines, electro-mechanical configurations for new pump sets, and technological choices for automated gas or liquid chlorination systems and SCADA/telemetry networks. This must include dynamic hydraulic modelling to ensure that improvements at the Oppitopi node do not negatively affect downstream pressure management zones at the Sandvlakte and Bonanza reservoirs.
- **Environmental and Statutory Feasibility:** The Service Provider must identify and undertake all relevant specialist investigations, assessments, and regulatory authorisations required to support the feasibility study, statutory compliance, and implementation readiness of the Integrated Upgrade of the Oppitopi Reservoir Node.

The scope shall specifically focus on the following key requirements:

- ✓ **Baseline & Statutory Review:** Conduct a baseline review of available or historical environmental, water-use, municipal, and servitude documentation, and perform initial regulatory screening.
- ✓ **Water-Use & Hydrological Feasibility:** Conduct hydrology, stormwater, and water-use regulatory assessments to determine and prepare all required Water Use Licence Applications (WULA) or General Authorisations (GA).
- ✓ **Hazardous Materials & Physical Infrastructure Safety:** Undertake a dedicated compliance assessment and management protocol for the handling, removal, transportation, and disposal of Asbestos Cement (AC) pipes.
- ✓ **Specialist Technical & Environmental Screenings:** Perform geotechnical site-risk assessments, ecological/wetland sensitivity screening, and any required secondary screenings (including heritage, land-use/servitude, traffic, and construction impacts).
- ✓ **Application Management & Client Support:** Identify, scope, compile, and manage all necessary statutory applications, providing full advisory support to RMLM until all final permits, authorisations, or clearances are obtained from competent authorities.
- **Economic and Financial Feasibility Assessment:** Develop detailed lifecycle cost matrices (CAPEX and OPEX). Perform a Cost-Benefit Analysis (CBA) that models municipal tariff impacts, long-term affordability, and financial returns generated from energy savings due to modernized electrical motor installations and lower NRW physical losses.

- **Institutional, Social, and Operational Assessment:** Assess the operational and technical capacity of the RMLM Technical Services department to operate the automated telemetry and dosing systems. Formulate a comprehensive project risk register, highlighting a Brownfield Construction Risk Mitigation Strategy that ensures uninterrupted bulk water supply to Zeerust Town during construction tie-ins.
- **Preliminary Design Package:** Draft preliminary engineering drawings, structural schematics and process flow diagrams.
- **Consolidated Comprehensive Feasibility Study Report:** Integrate all technical, financial, and statutory findings into a single, decision-grade feasibility report.

3.2.3 Phase 3: Transaction Advisory and Implementation Readiness

The service provider must package the approved engineering solutions into commercial and financial procurement structures.

- **Dynamic Financial Model Formulation:** Build a dynamic financial model that underpins project bankability. The model must clearly simulate project viability, tariff or grant affordability thresholds, fiscal sustainability, and structured risk-allocation matrix configurations necessary to secure formal capital funding.
- **Implementation Readiness Report:** Establish that all statutory conditions (asbestos handling permits, environmental sign-offs) have been identified and scheduled. Define a procurement plan, outlining packaging strategies (e.g., FIDIC Red vs. Yellow Book), draft scopes of work, and strict tender evaluation criteria for the eventual construction contract.
- **Transaction Advisory and Funding Support:** Formulate a dedicated funding and financing strategy. Prepare, align, and package formal capital funding applications for submission to relevant funding institutions and state infrastructure funds to secure capital commitments.

3.2.4 Phase 4: Intermediate Business Case Compilation

The outputs of Phase 2 and Phase 3 shall be structured such that they can be consolidated into ISA's 5-Case Intermediate Business Case (IBC) and a summarised (twenty (20) to twenty-five (25) pages) document, should this be required by a funding or approving authority.

- **Compiling the Intermediate Business Case (IBC):** Compilation of a decision-ready IBC aligned to the 5-case Model to support approvals and funding applications. The IBC must provide a structured, evidence-based assessment across the five dimensions of the 5-case model (see annexure 1 below).
- **The abridged summary document** should effectively communicate the business case in twenty (20) to twenty-five (25) pages with additional information attached as annexures. The following items should be clearly explained in the business case document:
 - ✓ Description and objectives of the project.
 - ✓ Demand and Market analysis.
 - ✓ Options analysis.
 - ✓ Socio-economic analysis.

- ✓ Financial model and budget statement.
- ✓ Risk statement and management plan.
- ✓ Procurement statement.
- ✓ Institutional and operational readiness.

3.3. General

- Progress meetings shall be held with ISA and RMLM on a bi-weekly basis.
- The Service Provider shall inform ISA and RMLM prior to contacting any third parties to obtain information or discuss the project details.
- The service provider will be required to sign a non-disclosure agreement (NDA).
- The Service Provider will be required to disclose any current work with ISA (active contracts).

3.4. Additional Information

- The following shall be provided to the appointed bidder at contracting stage:
Any available information from the municipality at the time of contracting.
- Available documents for all bidders:
 - ISA 5 Case Model Business Case Guideline [ISA-Journey_Navigating-Infrastructure-Project-Appraisal-Approval_2024.pdf](#)

4. PROJECT TIMELINES

The appointed service provider(s) will be required to start immediately after the award and complete the assignment within a duration of 8 months.

5. TECHNICAL EVALUATION CRITERIA

5.1 Other Technical Requirements

The bidder 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.

5.1.1 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
The bidder must demonstrate relevant experience in infrastructure project preparation, undertaking technical feasibility studies, transaction advisory, implementation readiness, and business case development for water and sanitation infrastructure projects. The bidder must provide three (3) references of projects undertaken for water and sanitation infrastructure projects; a contactable reference must be given (name, designation, relationship in the project, email, and telephone). If such information is not provided, the reference shall be deemed invalid. Refer to Table (a) Annexure 1 of this document for the response format provided.			
Substantiate / Comments			

5.1.2 BIDDER'S PROPOSED METHODOLOGY AND APPROACH	Comply	Partially Comply	Not Comply
The bidder shall submit a project-specific methodology demonstrating a clear, logical and coherent approach to delivering the scope of services set out in the Scope of work section 3.2.1 to 3.2.4. The proposed methodology must be tailored to the objectives, phasing and deliverables of the Integrated Upgrade of the Oppitopi Reservoir Node assignments and must demonstrate sufficient capacity to execute the work seamlessly. As a minimum, the proposed methodology shall: • Clearly describe the overall approach to information verification, concrete/structural integrity testing of Reservoirs 1 & 2, and hydraulic modelling of the node's distribution pathways (including downstream impacts on the Sandvlakte and Bonanza balancing reservoirs). • Detail the technical approach to modernizing the automated chemical dosing frameworks, electro-mechanical pump station configurations, and SCADA/telemetry networks. • Provide a clear regulatory execution framework for environmental authorizations and statutory occupational health protocols regarding the handling and disposal of hazardous Asbestos Cement (AC) pipes. • Demonstrate how the technical and financial/economic inputs will be synthesized to structure an automated financial lifecycle model (CAPEX/OPEX) and compile a decision-grade Five-Case Model Intermediate Business Case. • Incorporate robust Quality Assurance/Quality Control (QA/QC) mechanisms to ensure accurate sizing, hydraulic layouts, and bankable transaction outputs. • Describe the approach to risk identification, management, and mitigation throughout the assignment. • Demonstrate an understanding of key stakeholder interfaces, approvals and decision points relevant to the assignment.			
Substantiate / Comments			

5.1.3 BIDDER'S PROPOSED PROJECT PLAN	Comply	Partially Comply	Not Comply
The bidder must submit a detailed project plan with estimated duration up to 8 months from date of appointment. The project plan must be presented in the form of a High-Level Work Breakdown Structure (WBS), clearly aligned to the phases and/or deliverables described in the Terms of Reference (Phase 1 to Phase 4). The project plan must be supplemented by a high-level Gantt chart. The proposed project plan will be evaluated for clarity, realism and alignment with the scope of work.			
Substantiate / Comments			

5.1.4 QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
The bidder's personnel for the proposed team must have relevant qualifications, skills, and experience in infrastructure project preparation, undertaking technical feasibility studies, transaction advisory and implementation readiness, particularly within the water and sanitation sector Key personnel proposed for the assignment shall have a minimum of 5 years' post professional registration experience (for regulated professions). The bidder shall ensure that the proposed team provides appropriate coverage across the following competency areas. The Team must include the following as a minimum: i. Project Lead: Must be registered with either the Engineering Council of South Africa (ECSA) as a Professional Engineer (Pr. Eng) or the South African Institute of Chartered Accountants (SAICA) / South African Institute of Professional Accountants (SAIPA). ii. Technical Lead / Civil & Structural Engineer: Must be registered with ECSA as a Professional Engineer (Pr. Eng), with demonstrated experience in bulk water reservoir structural design/rehabilitation and hydraulic pipeline sizing. iii. Finance Lead: Must be registered with SAICA/SAIPA. Financial Modelling and Valuation Analyst (FMVA) certification would be advantageous. iv. Economics Lead: Must have relevant experience conducting socio-economic impact assessments and formal Cost-Benefit Analyses (CBA) for public infrastructure. v. Any additional resources that the bidder considers essential for the project must be included as part of the proposed team. These resources must possess relevant experience and maintain valid registration with the applicable statutory or professional bodies appropriate to their roles.			

5.1.4 QUALIFICATIONS AND SKILLS OF KEY PERSONNEL	Comply	Partially Comply	Not Comply
<i>Bidders shall submit, as part of their proposal:</i> • The structure and composition of the proposed team, clearly outlining the main disciplines/ specialties of this project and the key personnel responsible for each specialty. Please refer to Table (b) Annexure 1 of this document for the format in which the required information must be provided. • Curriculum Vitae (CVs) of key personnel, clearly highlighting qualifications, professional registration (where applicable), and experience relevant to the scope of this assignment. • Proof of professional registration with applicable statutory bodies.			
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
<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.	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

Activity/ Deliverable	Resource(s)*	Rate/Hour per resource	Number of hours	Total Cost (VAT Excl.)
PHASE 1 – INFORMATION REVIEW AND GAP ANALYSIS (Ref. to SOW 3.2.1)				
i. Update Needs Assessment				
ii. Scoping Gap Analysis Report				
Disbursements (Phase 1)				
Sub-Total VAT excl. (Phase 1)				
VAT @ 15%				
Total Vat incl. (Phase 1)				
PHASE 2 – COMPREHENSIVE (TECHNICAL) FEASIBILITY STUDY (Ref. to SOW 3.2.2)				
i. Technical Feasibility Assessment				
ii. Environmental & Statutory Feasibility Assessment				
• <i>Baseline & Statutory Review</i>				
• <i>Water-Use & Hydrological Feasibility</i>				
• <i>Hazardous Materials & Physical Infrastructure Safety</i>				
• <i>Specialist Technical & Environmental Screenings</i>				
• <i>Specialist Technical & Environmental Screenings</i>				
• <i>Application Management & Client Support</i>				
• <i>Obtain any other relevant environmental authorisation/permits, if required</i>				
iii. Economic & Financial Feasibility Assessment				
iv. Institutional, Social & Operational Feasibility Assessment				
v. Preliminary Design Package				
vi. Comprehensive (Technical) Feasibility Study Report				
Disbursements (Phase 2)				
Sub-Total VAT excl. (Phase 2)				
VAT @ 15%				
Total Vat incl. (Phase 2)				
PHASE 3 – TRANSACTION ADVISORY (BANKABLE FEASIBILITY) AND IMPLEMENTATION READINESS (Ref. to SOW 3.2.3)				
i. Dynamic Financial Model Formulation				
ii. Implementation Readiness Study (IRS)				
iii. Transaction Advisory and Funding Mobilization				
Disbursements (Phase 3)				
Sub-Total VAT excl. (Phase 3)				
VAT @ 15%				

Total Vat incl. (Phase 3)				
PHASE 4 – INTERMEDIATE BUSINESS CASE COMPILATION (Ref. to SOW 3.2.4)				
Compiling the Intermediate Business Case (IBC)				
Twenty (20) to twenty-five (25) page summary document, with additional information attached as annexures				
Disbursements (Phase 4)				
Sub-Total VAT excl. (Phase 4)				
VAT @ 15%				
Total Vat incl. (Phase 4)				

TOTAL COST FOR PHASE 1 (VAT Incl.)	
TOTAL COST FOR PHASE 2 (VAT Incl.)	
TOTAL COST FOR PHASE 3 (VAT Incl.)	
TOTAL BID COST (VAT Incl.)	

Disbursements

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

Cost Element	Cost (VAT Excl.)
Total Disbursements	

Note on pricing:

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.

Summary of Costs

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

PRICE DECLARATION FORM

Dear Sir,

Having read through and examined the Request for Quotation (RFQ) Document, **T54/09/26** the General Conditions, The Requirement and all other Annexures to the RFQ Document, we offer **to develop feasibility, business case, advisory and implementation readiness services for the Oppitopi Reservoir Node project - Ramotshere Moiloa Local Municipality** to the IDC, at a total amount of:

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

R.....(Including VAT)

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

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

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

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

SIGNED

DATE

(Print name of signatory)

Designation

FOR AND ON BEHALF OF:

COMPANY
NAME

Tel No

Fax No

Cell No

SECTION 4: ANNEXURES

Bidder's Experience and the proposed Project Team

Authorized signatory: _____

The bidder must provide the following information:

[illegible]

Table (b) Details of the key personnel of the bidders' proposed team: (please refer to par 5.1.4 of Section 2 of this RFP document):

Name	Role / Duties in this Project	Relevant Project Experience			
		Project description, Client, Project period	Years of Experience	Professional Registration	CVs Attached Yes/No

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