



CALL FOR BIDS

BID NO: ECDC/ELN/396/112023

BID SUBJECT: PANEL OF TRANSACTION ADVISORS TO PROVIDE VARIOUS INVESTMENT PROJECTS DEVELOPMENT SERVICES TO THE ECDC FOR A PERIOD OF 3 YEARS.

Note:

Service Provider to indicate by ticking below the Area of Expertise they wish to be Evaluated and Shortlisted for: Failure to indicate may result in ECDC not being able to evaluate the Service Provider.

- Investments Project Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)
- Transaction Assessment and Due diligence (Commercial Due Diligence, Financial Due diligence, Technical due diligence, Valuation and Structuring etc)
- Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits)
-

The Request for Services (Returnable) – This Document

Issued by:

Prepared By

Eastern Cape Development Corporation
 ECDC House, Ocean Terrace Park, Moore Street,
 Quigney, East London.

 Tel: 043 704 5600

BIDDER NAME :

CSD NUMBER:

CLOSING DATE:	08 DECEMBER 2023
CLOSING TIME:	12h00

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Board Members: V Jarana (Chairperson) • S Somdyala (Deputy Chairperson) • A Wakaba CEO
 T Buthelezi • N Pietersen • S Siko • B Koneti • M Makamba • P Bono • T Cumming

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SECTION A: ABBREVIATIONS AND ACRONYMS	
B-BBEE	Broad-based Black Economic Empowerment
B-BBEEA	Broad-based Black Economic Empowerment Act 53 of 2003
B-BBEE Codes	Broad-based Black Economic Empowerment Codes of Good Practice-2007
CIDB	Construction Industry Development Board
DTI	Department of Trade and Industry
ECDC	Eastern Cape Development Corporation
EME	Exempt Micro Enterprise
IRBA	Independent Regulatory Board of Auditors
PCCA	Prevention and Combating of Corrupt Activities Act 12 of 2004
PFMA	Public Finance Management Act (Act 1 of 1999)
PPPFA	Preferential Procurement Policy Framework Act (Act 5 of 2000)
QSE	Qualifying Small Enterprise
SABS	South African Bureau of Standards
SANAS	South African National Accreditation System
SARS	South African Revenue Service
SASAE	South African Standard on Assurance Engagements
SCM	Supply Chain Management
SMME	Small, Medium and Micro Enterprises
ToR	Terms of Reference
CSD	National Treasury Central Supplier Database for South African Government
OEM	Original Equipment Manufacturer
DPSA	Department of Public Service and Administration
B: DEFINITIONS	
Acceptable tender	Means any tender which, in all respects, complies with the specifications and conditions of tender as set out in the tender document.
Accreditation Body	Means the South African National Accreditation System or any other entity appointed by the Minister from time to time whose function it is to: Accrediting verification agencies Developing, maintaining and enforcing of Verification Standards
Affordable	Means (in terms of a PPP-Agreement) that the financial commitments to be incurred can be met by funds: Designated within ECDC's existing budget for the function to which the agreement relates; and Destined for ECDC in accordance with the relevant Treasury's future budgetary projections.
All applicable taxes	Includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.
B-BBEE status level of contributor	means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
Bid	Means a written offer or proposal to supply goods and/or provide services, submitted in response to the ECDC's invitation to quote or submit proposals which includes advertised competitive bids, written price quotations or proposals.
Bid Specification	A specification that lays down the characteristics of goods to be procured or their related processes and production methods, or the characteristics of services to be procured or their related operating methods, including the applicable administrative provisions, and a detailed requirement relating to conformity assessment procedures that an entity prescribes and shall include TOR for specialised services.
Black People	means 'African', 'Indian' and 'Coloured' people who are citizens of the Republic of South Africa by birth; or are citizens of the Republic of South Africa by naturalisation before the commencement date of the Constitution of South Africa Act (1993); or became citizens of the Republic of South Africa after the commencement of the of the Constitution of South Africa Act (1993), but who for the Apartheid policy that has been in place to that date, would have been entitled to acquire citizenship by naturalisation prior to that date.
Broad based black empowerment	Means broad-based black empowerment means the empowerment of all black people including women, workers, youth, people with disabilities and people living in rural areas through diverse but integrated social-economic strategies that include, but are not limited to:

**SECTION A:
ABBREVIATIONS AND ACRONYMS**

	<p>Increase the number of black people that manage, own and control enterprises and productive assets;</p> <p>Facilitating ownership and management of enterprises and productive assets by communities, workers, cooperatives and other collective enterprises</p> <p>Human resources and skills development</p> <p>Achieving equitable representation in all occupational categories and levels in the workforce</p> <p>Preferential procurement; and</p> <p>Investment in enterprises that are owned or managed by black people.</p>
Broad based black empowerment Act	means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003)
Close family member	Shall mean: - member of the same household, parent (including adoptive parent), parent-in-law, son (including adoptive son), son-in-law, daughter (including adoptive daughter), daughter-in-law, step-parent, step-son, step-daughter, brother, sister, grandparent, grandchild, uncle, aunt, nephew, niece, the spouse or unmarried partner with relation to any of the person's above.
Code of Ethics	refer to the ECDC Code of Ethics for Management and Staff as may be amended from time to time.
Comparative price	Means the price after the factors of a non-firm price and all the unconditional discounts that can be utilised have been taken into consideration.
Consortium or joint venture	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.
Contract	Means the agreement that results from the acceptance of a bid by ECDC.
Designated sector	Means a sector, sub-sector or industry that has been designated by the DTI in line with national development and industrial policies for local production, where on local produced goods or locally manufactured goods meet the stipulated minimum threshold for local production and content.
Duly sign	means a document that has been signed by the Chief Financial Officer or other legally responsible person nominated in writing by the Chief Executive, or senior member / person with management responsibility (close corporation, partnership or individual).
Exempt Micro Enterprise (EME)	means an enterprise with a specified total annual revenue as per Department of Trade and Industry Codes of Good Practice on Broad Based Black Economic Empowerment
Family member	Means a husband or wife, any partner in a customary union according to indigenous law or any partner in a relationship where the parties live together in a manner resembling a marital partnership or a customary union; and any person related to either one or both persons referred above within the second degree through a marriage, a customary union or a relationship or the third degree of consanguinity.
Firm price	Means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract.
Fronting	Means a deliberate circumvention or attempted circumvention of the B-BBEE Act and the Codes. Fronting commonly involves reliance on data or claims of compliance based on misrepresentation of facts, whether made by the party claiming compliance or by any other person.
Functionality	Means the measurement according to predetermined norms, as set out in the tender documents, of a service or commodity that is designed to be practical or useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of the tenderer.
Imported content	Means that portion of the tender price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the bidder or its subcontractors) and which costs are inclusive of the costs abroad (this includes labour or intellectual property costs), plus freight and other direct importation costs, such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African port of entry.

**SECTION A:
ABBREVIATIONS AND ACRONYMS**

In the service of the state	<p>means:</p> <ul style="list-style-type: none"> ▪ an employee of any municipality who has a performance contract with the municipality and is employed on a permanent, temporary or short term basis. ▪ an employee or public servant of any national or provincial government as defined in terms of Public Services Act. ▪ a member who – <ul style="list-style-type: none"> ○ is a councillor of any municipal council as defined in the Local Government Municipal Structures Act (Act No 117 of 1998); ○ is a politician serving in any provincial legislature; or ○ is a politician serving in the National Assembly or the National Council of Provinces; ○ a member of the board of directors of any municipal entity; ○ an employee and a member of a government owned entity as defined in the Public Finance Management Act (Act No 1 of 1999); and / or such other meaning ascribed to it by National Legislation from time to time.
Local content	Means a portion of the tender price which is not included in the imported content, provided that local manufacture does take place.
Non-firm prices	Means all prices other than “firm” prices
Person	Includes a juristic person.
Price Quotation	An estimate describing the product, stating its price, time of shipment, and specifies the terms of the sale and terms of the payment.
Property	Includes all movable and immovable property and intellectual property belonging to ECDC.
Public Private partnership	<p>Means a commercial transaction between ECDC and a private party in terms of which:</p> <ul style="list-style-type: none"> ▪ the private party either performs a function o.b.o. ECDC for a specified or indefinite period, or acquires the use of state property for its own commercial purposes for a specified or indefinite period; ▪ the private party receives a benefit for performing the function or by utilising state property, either by way of: ▪ compensation from a revenue fund charges or fees collected by the private party from users or customers of a service provider to them; or a combination of such compensation and such charges or fees
Qualifying small entity	means an enterprise with a specified total annual revenue as per Department of Trade and Industry Codes of Good Practice on Broad Based Black Economic Empowerment
Rand value	means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties.
Related enterprise	Means an entity controlled by a measured entity whether directly or indirectly controlled by the natural persons who have direct or indirect control over that measured entity or the immediate family of those natural persons.
Service Level Agreement	Shall have the same meaning assigned as “Contract”
Shareholder	Means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.
State	<p>Means:</p> <ul style="list-style-type: none"> ▪ any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the PFMA ▪ any municipality or municipal entity ▪ national Assembly or the national Council of Provinces; or parliament
Stipulated minimum threshold	Means that portion of local production and content as determined by the DTI
Sub-Contract	Means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract.
Tender	The same meaning is assigned as ‘Bid’ above.
Threshold	Shall mean the financial limits on the value of goods or services to be procured as set and prescribed in this policy which shall determine the way these goods and services will be procured

**SECTION A:
ABBREVIATIONS AND ACRONYMS**

Total revenue	Means the total income of an entity from its operations as determined under South African Generally Accepted Accounting Practice.
Trust	Means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person.
Trustee	Means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.
Value for Money	Means that the item (public-private partnership agreement) results in a net benefit to ECDC defined in terms of cost, price, quality, quantity, or risk transfer, or a combination thereof.

SECTION B

1. General Information

1.1 Invitation to Bid

Eastern Cape Development Corporation (ECDC) invites skilled and experienced Business development and support consultancy service providers with a proven track record, to submit proposals for a range of services in line with their field of expertise and resources. This bid is aimed at service providers who can provide one or all the following service:

- Investments Project Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)
- Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc)
- Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits etc.)

ECDC will use the panel of the approved service provider when the need arises for the above services. Shortlisted service providers will be invited to submit proposals and quotations on specific tasks. This request for quotations process will be subject to the preferential procurement policy framework Act and the ruling preferential procurement regulations as applicable to provincial government business enterprises as listed under schedule 3(d) of the Public Finance Management Act and the ECDC Procurement Policy as amended from time to time.

The panel will be for a period of 36 months. New entrants to the Panel will be permitted to apply to be added on the list of approved panel annually, after the anniversary of the contract i.e. every 12 months until the 36 months has ended OR where ECDC has evaluated and number of shortlisted Bidders in the panel does not allow competitiveness in accordance to the ECDC SCM policy provisions. When the time comes ECDC will invite prospective suppliers that are not already on the panel to apply for accreditation and the same evaluation process will be carried out to shortlist for the prospective Service Provider.

1.2 Eligibility to bid/Minimum Requirements

- a) Service Providers must ensure that all the required returnable documents and annexures are submitted together with this bid document, fully completed, and signed as required in Table 1 below for mandatory returnable and Annexures.
- b) Bidders should note that inclusion into this panel list in no way guarantees the award of work by the ECDC.

1.3 Estimated timeline

Activity		Date	Time
1	Placing of Advert	17 NOVEMBER 2023	N/A
2	Compulsory Briefing Meeting	<p>There will be no briefing session. For any enquiries relating to this Bid please email the procurement department at tenders@ecdc.co.za, attention S Matyaleni.</p> <p>Bidders should send an email to ECDC Procurement at tenders@ecdc.co.za to register their interest in submitting.</p> <p>Answers/Clarity on Bid will be posted on the website at www.ecdc.co.za</p>	
3	Last day of questions	01 December 2023	N/A
4	Final date of submission of bids	08 December 2023	12h00 pm
5	Bid Validity	6 months	

All dates and times in this bid are South African standard time.

Any time or date in this bid is subject to change at ECDC's discretion. The establishment of a time or date in this bid does not create an obligation on the part of ECDC to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if ECDC extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

1.4 Compulsory Briefing Session

There will be no briefing meeting. For any enquiries relating to this Bid, please email the ECDC procurement department at tenders@ecdc.co.za for attention S Matyaleni and quote the Bid Number.

Communication with the Bidders and any clarity, queries of the Bid and answers to the queries will be posted on the website at www.ecdc.co.za and will also be communicated to the bidders via email where the Bidder has indicated to ECDC that they are interested in submitting a bid.

Very Important

Bidders should send an email to ECDC Procurement at tenders@ecdc.co.za to register their interest in submitting this bid stating the following:

- ✓ Bid Number
- ✓ Name of the Bidder
- ✓ Contact Person
- ✓ Contact Details

1.5 Submission of Bid Documents

The entire duly signed and completed bid document together with any attachments or annexures must be submitted as follows:

- a) Bids to be placed in sealed envelopes in the Bid Box on or before the final date and time of submission of proposals as indicated above labelled clearly as follows:

Bid Reference Number: **ECDC/ELN/396/112023**

Project Name: **PANEL OF TRANSACTION ADVISORS TO PROVIDE VARIOUS INVESTMENT PROJECTS DEVELOPMENT SERVICES TO THE ECDC FOR A PERIOD OF 3 YEARS**

Attention: **S MATYALENI**

Delivered at: **ECDC HEAD OFFICE AT ECDC HOUSE,
OCEAN TERRACE PARK, MOORE STREET,
QUIGNEY, EAST LONDON.**

IMPORTANT

All bid documents are to be **completed in permanent ink**.

- a) **No alterations of the Bid Document will be allowed.**
- b) **No correction fluid will be allowed. Corrections should be initialled.**
- c) **One original duly signed (by authorised representative) and completed bid document MUST be submitted inclusive of the terms and conditions of this bid document.**

A PDF soft copy of the duly signed and completed original bid (e.g. PDF format in Flash drive/disc) should be submitted with the Original duly signed and completed hardcopy bid document however non-submission of a soft copy will not result in the Bid being disqualified.

- d) **No faxed, email, proposal/bid will be accepted. No late submissions will be eligible for consideration by ECDC. The bid box is open on weekdays between 08h00am and 16h30pm.**

1.6 Preferential Procurement

This bid and during the time of Request for Quotation the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2022 as applicable to Provincial Government Business Enterprises as listed under Schedule 3(D) of the Public Finance Management Act and the ECDC Procurement Policy as amended from time to time will apply.

1.7 Evaluation Criteria

This bid will be evaluated in the following stages:

Pre- Qualification	Service Providers are to meet all the Mandatory Requirements to be evaluated further. Failure to submit the Mandatory Requirements as required will result in the bid being disqualified. Service Providers that have passed this will be evaluated on stage 1
Stage 1	<p>Involves an evaluation of functionality only –</p> <p>The proposals scoring a minimum of 70% for functionality points will be short listed to this panel and will be invited on a quotation basis, based on their area of expertise that they have been shortlisted to when the need arises. Submissions scoring less than 70% will be deemed to be non-responsive.</p> <p>ECDC reserves the right to limit the number of service providers on the panel. (ECDC will limit the number of service providers by using highest functionality points.)</p>

1.7.1 Bid Validity Period

Responses to this tender received from bidders will be valid for a period of **Six (6) Months** counted from the closing date of the tender.

1.7.2 Pre-Qualification – Stage 1 (Mandatory Requirements)

Bidders to meet the following Mandatory Requirements in order to be evaluated on stage 2;

STAGE 1: Table 1: Mandatory Requirements

Description	Mandatory Requirement for Award	Disqualification if not submitted with Bid or Bidder is found to be Non-Compliant at the Time of Bid Close
<p>1. Bidders must be registered on the National Treasury Central Supplier Database (CSD). The following information will be verified on the National Treasury Central Supplier Database:</p> <ul style="list-style-type: none"> • Business Registration including details of directorship and membership, - The bidders' Business Registration Status will be verified on the CSD prior to the bid award and where the preferred bidder's status is under deregistration, 7 working days will be granted for remedy, failing which the bidder will be disqualified. • ID Number, • Government Employee • Tender Defaulting and Restriction Status. Should the Tender be a restricted supplier or a defaulting supplier they will be disqualified <p><u>Onus on the Service Provider</u></p> <p>Onus is on the Service Provider to make sure that all these are active and compliant on the CSD at the time of bid closing and tender award.</p> <p>ECDC will verify if the Service Provider has been registered on CSD. Service Provider to submit CSD Number as required in the Cover Page. It is the responsibility of the Service Provider to ensure that the correct CSD Number is provided.</p> <p>If Service Provider is not registered on CSD by the time of closing of the bid they will not be considered for evaluation.</p> <p><u>Directors/Employees in the Service of State</u></p> <p>Where a person within the Bidding Entity is an Employee of the State, Bidder should:</p> <ol style="list-style-type: none"> a) submit a signed letter on a letter head from their Accounting Officer/Accounting Authority (AO/AA of the Government Institution where they are employed) stating that they are not prohibited from conducting business with the State in terms of Section 8 of the Public Administration Management Act, 2012 (Act No.11 of 2014- " The PFMA") b) submit a signed letter on a letter from their AO/AA granting permission to perform other remunerative work outside of their employment where the PAMA does not apply to such an employee. 	Yes	Yes

Description	Mandatory Requirement for Award	Disqualification if not submitted with Bid or Bidder is found to be Non-Compliant at the Time of Bid Close
<p>ECDC reserves the right to verify such information from their AO/AA</p> <p><u>JV's and Consortium</u></p> <p>Where the Bidder is a JV/Consortium, each firm must be registered on the CSD.</p>		
<p>2. Tax Compliance Requirements:</p> <ul style="list-style-type: none"> Bidders must ensure compliance with their tax obligations. The bidders' Tax status will be verified on the CSD prior to the bid award and where the preferred bidders is not compliant, 7 working days will be granted for remedy, failing which the bidder will be disqualified. In Bids where Consortia/Joint venture/sub-contractors are involved; each party will be verified on the CSD. 	Required at Quotation Stage	No
<p>3. Duly signed Letter of Authority MUST be submitted authorising the individual to sign on behalf of the bidder if:</p> <p>a) If there are more than one Owner/ Director / Shareholder / Member / Trustee etc. OR</p> <p>b) If there is only one Director / Shareholder / Member / Trustee / Owner etc. and they are not the one completing the bid document.</p> <p>Note: The Letter of Authority MUST be signed by all directors of the Bidder (or a signed Board Resolution authorising the signatory will be accepted – Board Resolution to be signed by an authorised individual).</p>	Yes	Yes
<p>4. Annexure A – Supplier Information (SBD 1) (Completed and signed by the delegated authority)</p>	Yes	Yes
<p>5. Annexure D: Pricing Schedule Professional Services</p>	RATE BASED	RATE BASED
<p>6. Annexure F - (SBD 4): Bidder's Disclosure (bidder); (Signed and Completed by delegated authority)</p>	Yes	Yes
<p>7. Annexure E - Statement of Consent to Data Processing (Signed and Completed by the Duly Authorised Signatory). Attach Delegation of Authority.</p>	Yes	<p>No</p> <p>(Should be completed for the evaluation of the Bid . The Bidder should grant ECDC consent for Data Processing of their information .</p>

Description	Mandatory Requirement for Award	Disqualification if not submitted with Bid or Bidder is found to be Non-Compliant at the Time of Bid Close
		Where the Bidder has not completed Annexure G by the time the Bid has closed, the Bidder will be requested to complete Annexure G during evaluation period. If Bidder does not complete and sign Annexure G within the allocated time, the Evaluation Committee will assume that the Bidder does not give consent and their Bid will not be evaluated further)
8.	<p>Annexure F – (SBD 6.1.): Preferential Points Claim (Signed and Completed).</p> <p>Note</p> <p>Failure to submit the preference points claim and proof of address may result in awarding of 0 (zero) points preference points under Eastern Cape locality.</p> <p>51% ownership of youth and women in the company/enterprise will be verified on the CSD report and points will be allocated accordingly.</p>	NO
9.	<p>Declaration with regards to Company /Firm Location</p> <p>Attach a proof of address to claim points for the Eastern Cape base locality as the specific goal as advised in the tender / quotation qualifies the company/firm for the PPR of 2022 preference points claim.</p> <p>This information will be verified from the FICA documents (Physical Address, Utility Bill, Telephone, Tax Clearance, lease agreement submitted by the bidder.</p> <p>Failure to submit the declaration and proof of address may result in awarding of 0 (zero) points preference points under Eastern Cape locality.</p>	NO
The following will be applicable to Joint Ventures/Consortium		

Description	Mandatory Requirement for Award	Disqualification if not submitted with Bid or Bidder is found to be Non-Compliant at the Time of Bid Close	
ALLOCATION OF PREFERENCE POINTS CLAIMED BY BIDDERS IN JOINT VENTURE/CONSORTIA AGREEMENTS WILL BE ALLOCATED IN LINE WITH CIRCULAR NO. 02 OF 2023/24			
10.	Consortium/Joint Venture Agreement or letter of intent to enter in a Consortium / Joint Venture signed by all Consortium Members who are Duly Authorized.	Yes	Yes
11.	Resolution of the Board of Directors to enter into a Consortium/Joint Venture from each member firm of the Consortium/Joint Venture for this Bid.	Yes	Yes
12.	<p>Letter of Authority of Signatory(individual) authorizing the Signatory to sign on behalf of the Consortium/JV.</p> <p>The Letter of Authority MUST be from each member firm and must be signed by all directors of each member firm (or Board Resolution will be accepted).</p>	Yes	Yes
13.	<p>Annexure F – (SBD 6.1.): Preferential Points Claim (Signed and Completed).</p> <p>Failure to submit the preference points claim and proof of address from each JV /Consortium member may result in awarding of 0 (zero) points preference points under Eastern Cape locality.</p> <p>51% ownership of youth and women in the company/enterprise will be verified on the CSD report and points will be allocates accordingly.</p>	NO	NO
14.	<p>Declaration with regards to Company /Firm Location</p> <p>Attach a proof of address to claim points for the Eastern Cape base locality as the specific goal as advised in the tender / quotation qualifies the company/firm for the PPR of 2022 preference points claim.</p> <p>This information will be verified from the FICA documents (Physical Address, Utility Bill, Telephone, Tax Clearance, lease agreement submitted by the bidder.</p> <p>Failure to submit the declaration and proof of address may result in awarding of 0 (zero) points preference points under Eastern Cape locality.</p>	NO	NO

KINDLY NOTE THAT, FAILURE TO SUBMIT THE REQUIRED MANDATORY DOCUMENTATION WITH THE BID WILL RESULT IN YOUR BID BEING DISQUALIFIED WITHOUT FURTHER CONSIDERATION.

Stage 2 – Functionality Evaluation Criteria

Involves an evaluation of functionality only –

The proposals scoring a minimum of **70%** for functionality points will be short listed to this panel and will be invited on a proposal and quotation basis, based on their area of expertise that they have been shortlisted to when the need arises. Submissions scoring less than **70%** will be deemed to be non-responsive.

ECDC reserves the right to limit the number of service providers on the panel. (ECDC will limit the number of service providers by using highest functionality points.)

Bidders will be evaluated according to the area of expertise that they have indicated to providing on the Cover Sheet i.e. either:

- Investment Projects Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.), Due Diligence, Market Research)
- Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc.)
- Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits)
-

Bidder is required to have indicated in the coversheet the area of expertise they want to be considered for evaluation.

Investment Projects Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)

CRITERIA FOR FUNCTIONALITY – Investment Projects Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)	
A. EXPERIENCE OF THE KEY PERSONNEL	
<p>Experience of the key personnel</p> <p>ECDC requires at a minimum the following key personnel to be allocated to have at least 3 years' experience in the field of Investment Projects Development after obtaining academic qualification in the area that they are allocated for:</p> <p><u>Documents to be submitted for Scoring:</u></p> <p>a. Service Provider to submit CV / CV's (or Complete Annexure C) for the individual/s team members illustrating their relevant qualification/s and Investment Projects Development experience.</p> <p>Consultant</p> <ul style="list-style-type: none"> ✓ ECDC requires a consultant/s with a minimum of 3 years' experience in Investment Projects Development ✓ No points will be allocated if the above is not adhered to: <ul style="list-style-type: none"> • 6 and above years = 30 Points • 3 - 5 years = 20 points • 0 – 2 years = 0 points <p>N.B. Score will be awarded for key personnel as displayed on their CV / CV's. Score/points will be allocated to the team member with highest number years of experience.</p>	30
B. EXPERIENCE AND TRACK RECORD – Provide reference letters from previous clients	
<p>Track Record</p> <p>Bidder must have a track record of a minimum of three (03) similar projects where the Bidder has completed Investment Projects Development) OR three (03) similar projects (research report) where a bidder has completed and submitted similar approved reports.</p>	40 points

CRITERIA FOR FUNCTIONALITY – Investment Projects Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)

Bidder must demonstrate that it has a track record of a minimum three **Investment Projects Development**. Any reference letter/s submitted that did not include evidence / confirmation in **Investment Projects Development** reports will not be considered for scoring. **(Number of projects undertaken from same employer/client still be considered as separate references and therefore counted and scored accordingly)**

The reference letters should include:

- Name of the project,
- Name of the client,
- Contact name and details of the client
- Scope of services and outcomes of the work that was rendered to the client,
- Reference letter to be signed.
- Reference letter to be on a client’s letter head/have a client stamp.

To be included and attached in the track record would be a profile of the company to prove that the Bidder provides similar works and CVs of the team envisaged to be part or related to the company. **To obtain points the bidder must submit at least 3 reference letters or a letter with at least 3 projects completed for the client.**

Scoring:

- 6 reference letters and above = 40 points
- 3 - 5 reference letters = 30 points
- 0 – 2 project = 0 points

N.B. Consideration will be given to those reference letters that are directed to key personnel or personal references about the key personnel. Reference letters may be for individuals or company that has done the work.

C. Academic qualification Documents to be Submitted.

Bidders to submit:

Copies of the academic qualifications 30 points

B	Honours and above	30
C	B - Tech / B - Degree	20
D	National Diploma	5
E	National Certificate	0

- i. **Copies of the academic qualifications of the highest qualified team member will be considered. ECDC has the right to request the shortlisted service provider to submit certified copies of the certificate.**

Total Points

100

2. Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc.

CRITERIA FOR FUNCTIONALITY – Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc.		
A.	B. EXPERIENCE OF THE KEY PERSONNEL	
	<p>Experience of the key personnel</p> <p>ECDC requires the following key personnel to be allocated to have at least 3 years’ experience in the field of Transactional Assessment and Due Diligence after obtaining academic qualification in the area that they are allocated for as follows:</p> <ul style="list-style-type: none"> ✓ Transactional Assessment ✓ Due Diligence <p><u>Documents to be submitted for Scoring:</u></p> <p>Service Provider to submit organogram/project team with CV / CV’s (or Complete Annexure C) of the individuals with qualifications for the provision of Transactional Assessment and Due Diligence.</p> <ul style="list-style-type: none"> ✓ ECDC requires a consultant with a minimum of 3 years’ experience in servicing the Transactional Assessment and Due Diligence consulting field. No points will be allocated if the above is not adhered to: <p>Transactional Assessment and Due Diligence</p> <ul style="list-style-type: none"> • 6 and above years = 30 Points • 3 - 5 years = 20 points • 0 – 2 years = 0 points <p style="text-align: center;">N.B. Score will awarded for key personnel with the highest number of years’ experience as displayed on their CV’s for both categories.</p>	30
C.	D. EXPERIENCE AND TRACK RECORD – Provide reference letters from previous clients	
	<p>Track Record</p> <p>Bidder must have a track record of a minimum of three (03) projects where the Bidder has Transactional Assessment and Due Diligence OR three (03) similar projects where a bidder has completed and submitted similar portfolio that were accepted.</p> <p>Bidder must demonstrate that it has a track record of a minimum Transactional Assessment and Due Diligence or similar projects for an entity. This will be done through submission of reference letters from previous employers. The reference letters should include:</p> <ul style="list-style-type: none"> • Name of the project, • Name of the client, • Contact name and details of the client • Scope of services and outcomes of the work that was rendered to the client, • Reference letter to be signed. • Reference letter to be on a client’s letter head/have a client stamp. <p>To be included and attached in the track record would be a profile of the company to prove that the Bidder provides similar works and CVs of the team envisaged to be part or related to the company. To obtain points the bidder must submit at least 3 reference letters or a letter with at least 3 projects completed for the client .</p> <p>5 similar projects = 40 points 4 similar projects = 30 points 3 similar projects = 20 points Less than 3 similar projects on marketing and / or communication and / or graphic design = 0 points</p>	40 points

CRITERIA FOR FUNCTIONALITY – Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc.		
N.B. Consideration will be given to those reference letters that are directed to key personnel or personal references about the key personnel. Scoring will be allocated to the highest qualified team member.		
E.	F. Academic qualification	
		30 points
	Honours	30
	B - Tech / B - Degree	20
	National Diploma	10
	National Certificate	0
Documents to be Submitted. ii. Copies of the academic qualifications for the highest qualified team member will be considered. ECDC has the right to request the shortlisted service provider to submit certified copies of the certificate. iii. Qualification of the project team should have qualification in Transactional Assessment and Due Diligence		
Total Points		100

3. Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits)

CRITERIA FOR FUNCTIONALITY – Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits)	
G. EXPERIENCE OF THE KEY PERSONNEL	
<p>Experience of the key personnel</p> <p>ECDC requires at a minimum one of the key personnel to be allocated in the project team that are part of the panel to have at least 3 years' experience in the field of post deal support after obtaining academic qualification.</p> <p>Documents to be submitted for Scoring:</p> <p>a. The bidder submit organogram/project team with CV / CV's (or Complete Annexure C) of the individuals with qualifications for the post deal support services.</p> <p>Consultant</p> <p>✓ ECDC requires the consultant/s with a minimum of 3 years' experience in post deal support services.. The consultant may either have worked or been a consultant for the period stipulated. No points will be allocated if the above is not adhered to:</p> <ul style="list-style-type: none"> • 6 year and above = 30 Points • 3 - 5 years = 20 points • 0 – 2 years = 0 points <p>N.B. Score will be awarded for key personnel as displayed on their CV's. Scores will be allocated to the team member with the greatest number of years' experience.</p>	30
H. EXPERIENCE AND TRACK RECORD – Provide reference letters from previous clients	
<p>Track Record</p> <p>Bidder must have a track record of a minimum of three (3) projects where the bidder has done post deal support services. (Number of projects undertaken from same employer/client sill be considered as separate refences and therefore counted and scored accordingly</p>	40 points

CRITERIA FOR FUNCTIONALITY – Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits)

This will be done through submission of reference letters from previous employers. Any reference letter submitted that did not include post deal support services **will not be considered for scoring. (Number of projects undertaken from same employer/client will still be considered as separate references and therefore counted and scored accordingly)**

The reference letters should include:

- Name of the project,
- Name of the client,
- Contact name and details of the client
- Scope of services and outcomes of the work that was rendered to the client,
- Reference letter to be signed
- Reference letter to be on a client's letter head/have a client stamp

To be included and attached in the track record would be a profile of the company to prove that the Bidder provides similar works and CVs of the team envisaged to be part or related to the company. **To obtain points the bidder must submit at least 3 reference letters or a letter with at least 3 projects completed for the client**

10 and above similar projects = 40 points

5 - 8 similar projects = 30 points

3 - 4 similar projects = 25 points

Less than 3 similar projects in accounting work = 0 points

N.B. Consideration will be given to those reference letters that are directed to key personnel or personal references about the key personnel. Reference letters for all different team members will be added and scored.

I. Academic qualification		30
	Honours / Post graduated diploma	30
	B - Tech / B - Degree	20
	National Diploma	15
	National Certificate	0

Documents to be Submitted.

- i. **Copies of the academic qualifications for the highest qualified team member will be considered. ECDC has the right to request the shortlisted service provider to submit copies of the certificate.**
- ii.

Total Points	100
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Alteration or withdrawal of Proposals

Bidders may withdraw their proposal by written notification on or before the award of Bids.

1.7 Costs for preparation of Proposals/presentations

The costs incurred by Bidders in respect of the attendance of any briefing or presentation meetings if necessary or costs incurred in preparing any proposal will be borne by the Bidder and the ECDC shall in no way be liable to reimburse such costs incurred.

1.8 Ownership of Proposals and presentations

The ECDC shall on receipt of any proposal relating to this request and submitted in accordance with the procedure set out herein, shall become the owner thereof and the ECDC shall not be obliged to return any proposal.

1.9 Tax Clearance Certificate requirements

It is a condition of all bids inclusive of foreign bidders / individuals) that the South African taxes of the successful bidder must be in order.

The bidders' Tax status will be verified on the CSD prior to the bid award and where the preferred bidders is not compliant, **7 working days** will be granted for remedy, failing which the bidder will be disqualified.

In Bids where Consortia/Joint venture/Sub-Contractors are involved; each party will be verified separately for proof of Tax Compliance Status.

In bids where Consortia / Joint Ventures / Sub-contractors are involved; each party must submit a separate Tax Clearance Certificate. Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website www.sars.gov.za

Since this is a panel, when ECDC issues RFQs we will ensure that all the Tax Requirements are complied with as indicated above.

1.10 Confidentiality

- 1.10.1 The entire process of calling for Bids was initiated by the ECDC in terms of its procurement policy and is confidential. All deliberations in respect of the acceptability or otherwise of the proposals shall be
- 1.10.2 Conducted in closed sessions and members of the Evaluation and Procurement Committee and prospective service providers are bound to treat all discussions as highly confidential.
- 1.10.3 The service provider shall not divulge directly or indirectly to any other person than a person employed by ECDC, make copies or extracts of any of the information obtained during this assignment, while they may have access to ECDC's trade secrets, confidential information which may include, specifications,
- 1.10.4 Plans, drawings, pattern, samples, written instructions, notes, memoranda, technical information, know-how or process or method or any other records of whatsoever nature without the written consent of
- 1.10.5 ECDC and shall surrender all these items to ECDC on termination of the assignment or on demand of ECDC.
- 1.10.6 The service provider shall not be entitled to make use of the information whether for its own benefit or that of others, to make available or derive any profit from any of the information or knowledge specifically related to the business or affairs of ECDC.
- 1.10.7 Any document shall remain the property of ECDC and shall be returned (all copies) to ECDC on completion of the contract if so required by ECDC.

1.11 Inventions Patent and Copyrights

- 1.11.1 The service provider cedes, assigns and transfers to ECDC all rights, title and interest in and to any and all copyright in all works and inventions which relates to the business of ECDC (which includes, but is not

- 1.11.2 Limited to, methodologies and products) which arises within the course and scope of this services will be assigned to ECDC.
- 1.11.3 Provide ECDC the sole and exclusive right to alter and adapt the work.
- 1.11.4 The service provider shall indemnify ECDC against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by ECDC.

1.12 Ethics

- 1.12.1 Any attempt by an interested Bidder to obtain confidential information, or enter into unlawful agreements with competitors or influence the Evaluation and /or the Procurement Committee or the ECDC during the
- 1.12.2 Process of examining, evaluating and comparing Bids/Proposals or Quotations will lead to the rejection of its bid/quotation/proposal in its entirety.
- 1.12.3 The Bidder must declare any business or other interests it has with the ECDC or any employee of the ECDC, as per the declaration of interest form annexed hereto marked in Section D; failing which the
- 1.12.4 Bidder shall be automatically disqualified from further participation in the Bid or call for proposals. The disqualification will be applicable at any stage of the bidding and / or engagement process.

1.21 Competition

- 1.21.1 Bidders and their respective officers, employees and agents are prohibited from engaging in any collusive action with respect to the bidding process which serves to limit competition amongst bidders.
- 1.21.2 In general, the attention of bidders is drawn to Section 4(1) (b) (iii) of the Competition Act 1998 (Act No. 89 of 1998) (the Competition Act) that prohibits collusive bidding.
- 1.21.3 An agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder/s is / are or a contractor(s) was / were involved in collusive bidding.
- 1.21.4 If bidders have reason to believe that competition issues may arise from any submission of a response to this bid invitation they may make, they are encouraged to discuss their position with the competition authorities before submitting response.
- 1.14.5 Any correspondence or process of any kind between bidders and the competition authorities must be documented in the responses to this invitation to bid.
- 1.21.6 If a bidder (s) or contractor (s), based on reasonable grounds or evidence obtained by ECDC, has /have engaged in the restrictive practice referred to above, ECDC may refer the matter to the Competition Commission for investigation and possible imposition of an administrative penalty as contemplated in Section 59 of the Competition Act 89 of 1998.
- 1.21.7 If a bidder(s) or contractor(s) has / have been found guilty by the Competition Commission of the restrictive practice referred to above, ECDC may in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such an item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) for conducting business with the public sector for a period of not exceeding (10 ten) years and / or claim damages from the bidder(s) / contractor(s) concerned.

1.22 Cancellation of Bid Process

The ECDC shall be entitled, within its sole and entire discretion, to cancel this Bid/Call for Proposals and/or Quotations at any time and shall notify the interested service providers accordingly. The ECDC shall in no way be liable for any damages whatsoever, including, without limitation, damages for loss of profit, in any way connected with the cancellation of this bid. The publication of the bid does not commit the ECDC to appoint any of the qualifying Bidders.

1.23 Interviews

In terms of the bid evaluation process short listed bidders may be interviewed. This will entail the bidder being invited to a venue as determined by the bid committee. All transport and accommodation costs incurred by the bidder will be for the bidders account and will not be reimbursed in any way. Failure to attend a scheduled interview will lead to immediate disqualification from the bid process.

The ECDC reserves the right to appoint a bidder without conducting interviews.

1.24 Contract award

- 1.24.1 The successful bidder will be notified of the bid award in writing by the Supply Chain Management Department
- 1.24.2 The acceptance of any proposal shall only be confirmed with the conclusion of a final written signed service level agreement or any other appropriate agreement between the ECDC and the successful Bidder, in terms of which the rights and duties of the parties are recorded, which agreement shall regulate the relationship between the ECDC and the Successful Bidder.
- 1.24.3 As a guideline regarding the content of the service level agreement, the bidder is referred to the general conditions of contract.
- 1.24.4 Until such time that an appropriate agreement has been concluded in writing between the ECDC and the successful Bidder, no rights shall be conferred, nor shall any legitimate expectations be conferred to the successful Bidder to carry out the works or services provided for in this Bid.
- 1.24.5 The ECDC, the Accounting Officer and the Bid Committee (as the case may be) does not bind itself to accept either the lowest (price), highest (points) or any other bid and reserves the right to accept the bid which it deems to be in the best interest of the Institution even if it implies a waiver by the ECDC, the Accounting Officer, or the Bid Committee, (as the case may be) of certain requirements which the ECDC, the Accounting Officer, the Bid Committee, (as the case may be) considers to be of minor importance and not complied with by the bidder.
- 1.24.6 The ECDC will not entertain any request of feedback before the final awarding of the contract.

1.25 Supplier Due Diligence

ECDC reserves the right to conduct supplier due diligence prior to final award or at any time during the contract period. This may include site visits and requests for additional information.

1.26 Disclaimer

- 1.26.1 This Bid document has been prepared for the purpose of providing information to interested Bidders. The provision of any additional information about the organization to Bidders, are disclosed and will be made available to enable the prospective Bidders to submit comprehensive proposals.
- 1.26.2 Interested Bidders are accordingly required to conduct their own due diligence in respect of the ECDC and its business operations and the nature and scope of the services required.
- 1.26.3 The ECDC accepts no responsibility for the fairness, accuracy or completeness of any information or opinions, for any errors, omissions or misstatements, negligent otherwise, made by any person in this Bid document or at any Compulsory briefing session
- 1.26.4 The ECDC accepts no liability for any loss incurred by any person(s) due to events or action taken as a consequence of the preparation and dissemination of this bid request.
- 1.26.5 Except in cases of criminal negligence or wilful misconduct, and in the case of infringement the bidder shall not be liable to ECDC, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the bidder to pay penalties and/or damages to ECDC; and
- 1.26.6 The aggregate liability of the bidder to ECDC, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

1.27 Contact and Communication

- 1.27.1 A nominated official of the bidder(s) can make enquiries in writing, to the specified person on the table below. Bidder(s) must reduce all telephonic enquiries to writing and send to the above email address.
- 1.27.2 The delegated office of ECDC, Procurement Department, may communicate with Bidder(s) where clarity is sought in the bid proposal.
- 1.27.3 Any communication to an official or a person acting in an advisory capacity for ECDC in respect of the bid between the closing date and the award of the bid by the Bidder(s) is discouraged.

All communication between the Bidder(s) and ECDC must be done in writing.

Details	Bidding Procedure
Department	Procurement Department
Contact person	S. Matyaleni
Telephone number	043 704 5600
Fax number	043 7228876
E-mail address	tenders@ecdc.co.za



ETHICS & FRAUD HOTLINE REPORTING CHANNELS

HOTLINE DETAILS	
Hotline Name:	ECDC Ethics & Fraud Hotline
Contact Number:	0800 116 665
WhatsApp Number:	0860 004 004
Dedicated Email Address:	ecdc@behonest.co.za aidc@behost.co.za
SMS Number:	48691
Free Post	BNT165, Advance Call Pty (Ltd), Brooklyn Square, 0075
Website Link	www.behonest.co.za
Chat	www.behonest.co.za

- 1.27.4 Whilst all due care has been taken in connection with the preparation of this bid, ECDC makes no representations or warranties that the content of the bid or any information communicated to or provided to Bidder(s) during the bidding process is, or will be, accurate, current or complete. ECDC, and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current or complete.
- 1.27.5 If Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by ECDC (other than minor clerical matters), the Bidder(s) must promptly notify ECDC in writing of such discrepancy, ambiguity, error or inconsistency in order to give ECDC an opportunity to consider what corrective action is necessary (if any).
- 1.27.6 Any actual discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by ECDC will, if possible, be corrected and provided to all Bidder(s) without attribution to the Bidder(s) who provided the written notice.

SECTIONS C
TERMS OF REFERENCE / BID SPECIFICATIONS

ABOUT ECDC

1. VISION

“A leader in facilitating inclusive sustainable economic growth”.

2. MISSION

To promote sustainable economic development in the Eastern Cape through focused:

- a) Provision of innovative development finance
- b) Leveraging of resources, strategic alliances, investment and partnerships.

3. LEGISLATIVE MANDATE

ECDC draws its mandate directly from the Eastern Cape Development Corporation Act (Act 2 of 1997) and is led by the economic development priorities of the provincial government, as detailed in the Provincial Growth and Development Plan (PGDP), Eastern Cape Provincial Industrial Development Strategy (PIDS), the policy statements and budget speech of the Member of the Executive Council (MEC) of Economic Development, Environment Affairs and Tourism (DEDEAT).

Section 3 of the ECDC Act states that the Corporation shall “plan, finance, co-ordinate, market, promote and implement development of the province and its people in the field of industry, commerce, agriculture, transport and finance”.

4. SCOPE OF SERVICES REQUIRED

The Eastern Cape Development Corporation plays a catalytic role in the economic development of the Eastern Cape which is anchored on sustainable and inclusive economic growth and job creation. To achieve these goals, amongst others the company invests directly in businesses and projects in sectors that have being identified as priority to the province which include agriculture and its value chains, manufacturing, automotive and transport, ICT, Tourism and aquaculture, global business services etc. -

The ECDC intends to establish a panel of transaction advisors s with variety of types of skills, knowledge, experience, and expertise that would be contracted to provide advisory services to the ECDC in its investment process.-

It is against this background that ECDC plans to create a panel of service providers which will be evaluated in terms of their expertise and experience. ECDC therefore invites skilled and experienced Transaction Advisors with a proven track record one / variety or all of the following services:

- Investment Projects Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.), Due Diligence, Market Research)
- Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc.)
- Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits)

ECDC will use the panel of the approved Service Provider(s) when the need arises for the above services using the RFQ process. Approved service providers will be invited to submit proposals and quotations on a specific task. This request for quotations process will be subject to the preferential procurement policy framework Act and the ruling preferential procurement regulations, as applicable to provincial government business enterprises as listed under schedule 3(d) of the Public Finance Management Act and the ECDC Procurement Policy as amended from time to time.

The panel will be for a period of 36 months. New entrants to the Panel will be permitted to apply to be added on the list of approved panel, annually after the anniversary of the contract i.e. every 12 months until the 36 months has ended OR where ECDC has evaluated and number of shortlisted Bidders in the panel does not allow competitiveness in accordance to the ECDC SCM policy provisions. When the time comes ECDC will invite prospective suppliers that are not already on the panel to apply for accreditation and the same evaluation process will be carried out to shortlist for the prospective Service Provider

4.1.1 **The scope of the panel of Service Provider's involvement will be as follows: -**

The required panel will be utilized in the pre-investment and post-investment ECDC investment process.

a. Investment Projects Development:

-
- Conduct feasibility studies (pre-feasibility and bankable feasibility).
- Business case improvement.
- Pre-implementation of investment projects.
- Implementation of investment projects

b. Transaction Assessment and Due Diligence:

- Commercial due diligence
- Financial due diligence
- Technical due diligence
- Valuation and Structuring

c. Post Deal Support:

- Business Turnaround
- Value Creation Implementation
- Business Support
- Investment Exits

CONDITIONS SPECIFIC TO THIS BID

1. Responsibilities and duties

- 1.1. Notwithstanding the fact that a description of the services has been provided above, ECDC shall be entitled to request additional services related to deliverables required to ensure the successful completion of the services set out above on such further terms and conditions as may be agreed between the parties in writing.
- 1.2. The service provider shall at all times faithfully and timeously carry out and perform the Services and shall use its best endeavours to properly conduct, improve, extend and develop the business of ECDC in the provisioning of the services.
- 1.3. The Services shall as part of his duties, attend such meetings as may be required by ECDC from time to time and submit weekly or monthly progress reports on the services as may be required and requested by ECDC.

2. Obligation to perform and sub-contracting.

- 2.1. The bidder shall notify ECDC in writing of all subcontracts awarded under this contract if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the bidder from any liability or obligation under the contract.
- 2.2. The bidder shall not assign, in whole or in part, its obligations to perform under the contract, except with ECDC's prior written consent.

3. Performance guarantee – (Not Applicable)

- 3.1. Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to ECDC the performance security of the amount specified above.
- 3.2. The proceeds of the performance security shall be payable to ECDC as compensation for any loss resulting from the bidder's failure to complete his obligations under the contract.
- 3.3. The performance security shall be denominated in the currency of the contract or in a freely convertible currency acceptable to ECDC and shall be in one of the following forms:
- 3.4. A bank guarantee or an irrevocable letter of credit issued by a reputable bank located in South Africa, acceptable to ECDC, in the form provided in the bid documents or another form acceptable to ECDC; or A cashier's or certified cheque.
- 3.5. The performance security will be discharged by ECDC and returned to the bidder not later than thirty (30) days following the date of completion of the bidder's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.
- 3.6. Notwithstanding the provisions above, the bidder shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

4. Anti-dumping and countervailing duties and rights

- 4.1. When, after the date of bid, provisional payments are required, or anti-dumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, ECDC is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall on demand be paid forthwith by the contractor to ECDC or ECDC may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him.

5. ECDC facilities

- 5.1. Unless otherwise agreed in writing by ECDC, the Service Provider will work from its own office and provide its own facilities, such as transport, telephone, cell phone, fax and computer facilities to perform the services.
- 5.2. The service provider may use certain facilities made available by ECDC to assist in performing the services, including but not limited to computer facilities, telephone and fax facilities and stationery. In this regard the service provider agrees to:
- 5.3. Abide by the health, safety and security measures as prescribed by ECDC from time to time;
- 5.4. To use such accommodation and facilities entirely at his own risk and ECDC shall not be liable for any loss or damage whatsoever and howsoever caused arising out of or in connection with the use of these items, other than loss or damage caused because of ECDC's own wilful misconduct.

6. Force majeure

- 6.1. If a force majeure situation arises, the bidder shall promptly notify ECDC in writing of such condition and the cause thereof. Unless otherwise directed by ECDC in writing, the bidder shall continue to perform its obligations under the contract as far as is reasonably practical and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

7. Warranties (Not Applicable)

- 7.1. Supply and installation of the equipment shall have at least minimum onsite warranty of 5 years.
- 7.2. The bidder warrants that the services supplied under the contract incorporate all recent improvements in design and materials unless provided otherwise in the contract. The bidder further warrants that all designs etc, supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by ECDC's specifications) or from any act or omission of the bidder, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.
- 7.3. If the bidder, having been notified, fails to remedy the defect(s) within the period specified above, ECDC may proceed to take such remedial action as may be necessary, at the bidder's risk and expense and without prejudice to any other rights which ECDC may have against the bidder under the contract.
- 7.4. ECDC shall promptly notify the bidder in writing of any claims arising under this warranty.
- 7.5. Upon receipt of such notice, the bidder shall, within the period specify and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to ECDC.

8. Spare parts (Not Applicable)

- 8.1. The bidder may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the bidder:
- 8.2. Such spare parts as ECDC may elect to purchase from the bidder, provided that this election shall not relieve the bidder of any warranty obligations under the contract; and
- 8.3. In the event of termination of production of the spare parts:
- 8.4. Advance notification to ECDC of the pending termination, in sufficient time to permit ECDC to procure needed requirements; and
- 8.5. Following such termination, furnishing at no cost to ECDC, the blueprints, drawings, and specifications of the spare parts, if requested.

9. Insurance

The service provider will be responsible for the insurance of the product and their employees until the commissioning of the final product.

• Responsibility to perform.

- 9.1. Delivery of the goods and performance of services shall be made by the bidder in accordance with the time schedule prescribed by ECDC in the contract (SLA).
- 9.2. If at any time during performance of the contract, the bidder or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the bidder shall promptly notify ECDC in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the bidder's notice, ECDC shall evaluate the situation and may at his discretion extend the bidder's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.
- 9.3. ECDC reserves the right to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the bidder's point of supply is not situated at or near the place where the supplies are required, or the bidder's services are not readily available.
- 9.4. A delay by the bidder in the performance of its delivery obligations may render the bidder liable to the imposition of penalties, unless an extension of time is agreed upon without the application of penalties.
- 9.5. ECDC shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance.
- 9.6. ECDC may also consider termination of the contract.

10. Duration of the contract

- 10.1. It is anticipated that the appointment will be made during **January 2024** and the service provider will be expected to be available and start immediately as soon as a Service Level Agreement is signed.
- 10.2. The contract will be for a **duration of three (3) years**.
- 10.3. The successful Service Provider shall be required to complete the project within the duration of the contract specified above
- 10.4. ECDC wishes to inform the bidder annually on the availability of the funding for the project. Should the funding not be made available, ECDC will inform the successful service provider in writing and prepare the termination of contract process.
- 10.5. Upon any delay beyond the delivery period in the case of a supplies contract, ECDC shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the bidder's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the bidder.
- 10.6. **Note: The award will be conditional on ECDC and the Bidder agreeing on the terms and condition of the Service Level Agreement.**

11. Project Plan

Service Provider to submit a project plan within 5 working days of the award of the project. ECDC and Service Provider to agree on the final timelines of the project.

12. Payments and tax

- 12.1. Payments shall only be made in accordance with the fees as quoted in this documentation. Prices charged by the bidder for goods delivered and services performed under the contract shall not vary from the prices quoted by the bidder in this bid, except for any price adjustments authorized at ECDC's request for bid validity extension, as the case may be. Invoicing by the bidder to ECDC must be made quarterly.
- 12.2. ECDC will reimburse the service provider for expenses and disbursements incurred subject to the submission of satisfactory proof that such expenses and disbursements have been incurred and subject to it being within the budget as indicated in this documentation.

- 12.3. The service provider shall from time to time during this contract duration furnish ECDC with a VAT compliant tax invoice accompanied by a copy of the delivery note and upon fulfilment of other obligations stipulated in the contract. Each invoice must be accompanied by a detailed timesheet and expense claim forms substantiating the amount claimed.
- 12.4. Payments shall be made promptly by ECDC in Rand, but in no case later than thirty (30) days after submission of a VAT compliant tax invoice and supporting documentation by the service provider if the services have been properly executed as agreed.
- 12.5. Payment will only be affected once the equipment has been installed and commissioned.
- 12.6. The service provider shall retain all proof of expenditure and maintain such accounts and records as are reasonably necessary, claimed above, should ECDC require an audit to substantiate that expenditure and allows ECDC's own personnel or an independent auditor access to those records.
- 12.7. Should the above audit reveal that ECDC has been overcharged, the Service Provider will re-imburse the ECDC the amount overcharged within 30 days inclusive of interest calculated at prime plus 2% per annum.
- 12.8. A foreign bidder shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the Republic of South Africa.
- 12.9. A local bidder shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to ECDC.

13. VALUE ADDED TAX (VAT)

13.1 Prices quoted by VAT Vendors **MUST** be inclusive of VAT and as such any price charged by the vendor in respect of any taxable supply of goods or services shall for the purposes of the VAT Act Section 64(1) be deemed to include any tax payable in terms of section 7(1) (a) in respect of such supply, whether or not the vendor has included tax in quote/bid price.

13.2 In all instances where bidders (including VAT Vendors) have excluded VAT from the prices quoted , such prices must be evaluated excluding VAT and if the bidder is successful , the letter of award of contract will state that the price at which the contract is awarded is exclusive of VAT and the VAT will not be added on at any stage . **The successful bidder will have to absorb the adverse financial implications of not including VAT in the price quoted.**

13.3 Prices quoted by non-VAT Vendors **MUST NOT** include VAT. However Non-VAT vendors who submit bids for contracts that would, if successful, take their annual turnover to be above the threshold of R1 million are obliged to include VAT in the prices quoted and must therefore immediately upon award of the contract, register with the South African Revenue Services (SARS) as VAT Vendors. **The award of such a contract would be conditional pending the successful Bidder submits proof of registration as a VAT Vendor with SARS**

SECTION D

ANNEXURE A: SUPPLIER INFORMATION

Legal Name of Bidder: (Same as CSD)	
Trading Name of Bidder: (Same as CSD)	
Registration Number (Same as CSD)	
Physical Address	
Postal Address	
Contact Person	
Title/Position in the Firm	
Mobile Number	
Bidder Telephone Number	
Facsimile Number	
Email Address of Contact Person	
Email Address of Bidder	
VAT Registration Number (Same as CSD)	
Central Supplier Database Number	MAAA
B-BBEE STATUS VERIFICATION	
<p>Very Important: (Attach B-BBEE Status Verification from Accredited Service Provider or B-BBEE Sworn Affidavit (for EME's and QSEs) must be submitted in order to qualify for preference points for B-BBEE)</p>	
Are the Accredited Representative in South Africa for the Goods/Services/Works Offered?	<input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes enclose Proof)
Are you a foreign based supplier for the Goods/Services/Works Offered?	<input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes, answer the questionnaire Below)

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

Is the Entity a resident of the Republic of South Africa (RSA)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the Entity have a branch in the RSA?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the Entity have a permanent establishment in the RSA?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the Entity have any source of income in the RSA	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If the answer is “No” to all of the above, then it is not a requirement to register for a Tax Compliance Status system pin code from the South African Revenue (SARS) and if not register

VERY IMPORTANT

Directors/Employees in the Service of State

Where a person within the Bidding Entity is an Employee of the State, Bidder should

- a) submit a signed letter on a letter head from their Accounting Officer/Accounting Authority (AO/AA of the Government Institution where they are employed) stating that they are not prohibited from conducting business with the State in terms of Section 8 of the Public Administration Management Act, 2012 (Act No.11 of 2014- “ The PFMA”)
- b) submit a signed letter on a letter from their AO/AA granting permission to perform other remunerative work outside of their employment where the PAMA does not apply to such an employee

ECDC reserves the right to verify such information from their AO/AA

SERVICE PROVIDER ACKNOWLEDGEMENT OF REQUEST AND TERMS AND CONDITIONS:

I..... (NAME) HEREBY ACCEPT THE TERMS OF THIS REQUEST FOR QUOTATION/BID AND ACKNOWLEDGE

THAT I AM APPROPRIATELY DELEGATED TO RESPOND ON BEHALF OF (ATTACH DELEGATION OF AUTHORITY)

.....

(NAME OF BIDDER).

Print Name

Date

Designation

Signature

ANNEXURE B – AREA of EXPERTISE

Bidders to indicate the area of expertise that they are responding to or what to be evaluated for

- Investments Project Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)
- Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc)
- Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits etc.)

SIGNATURE of the DELEGATED AUTHORITY		DATE	
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ANNEXURE C 1 : KEY PERSONNEL

1 How many full-time staff will be involved in this project?

2 Provide the names of the full-time staff members and indicate the portfolios for which they are responsible.

a) **Investments Project Development (Feasibility Studies, Business Case Improvement, Implementation of Investment Projects etc.)**

Name of staff member	Designation	Type of accreditation (Where applicable) (Indicate Yes/No) Attach Certificate	Years of Experience in the allocated field / area. Attach CV

3. Comments:

b) **Transaction Assessment and Due Diligence (Commercial Due Diligence, Financial Due Diligence, Technical Due Diligence, Valuation and Structuring etc)**

Name of staff member	Designation	Accreditation to strategy, business planning, futurist, scenario planning bodies (Indicate Yes/No) Attach Certificate	Years of Experience to develop/ implement/facilitate strategy/business plan/ futurist/ scenario planning. Attach CV
	Senior Consultant/Lead		
	Consultant		

3. Comments:

c) <input type="checkbox"/> Post Deal Support (Business Turnarounds, Value Creation Implementation, Business Support, Investment Exits etc.)				
	Name of staff member	Designation	Accreditation to strategy, business planning, futurist, scenario planning bodies (Indicate Yes/No) Attach Certificate	Years of Experience to develop/ implement/facilitate strategy/business plan/ futurist/ scenario planning. Attach CV
		Senior Consultant/Lead		
		Consultant		
3. Comments:				

ANNEXURE C 2 : EXPERIENCE				
Attach Reference Letter as per requirement of Functionality				
1	Provide details of the Company's experience in working on similar projects (maximum of 3). Attach Reference Letter			
	Projects Completed	Date Completed	Approximate Cost	Contactable References
				Name: Surname: Email Phone Number
				Name: Surname: Email Phone Number
				Name: Surname: Email Phone Number
				Name: Surname:



				Email
				Phone Number
				Name:
				Surname:
				Email
				Phone Number
2	Comments:			

ANNEXURE D: PRICING SCHEDULE PROFESSIONAL SERVICES

- Bidders are required to expressly cover their proposed rate for the listed resources and disbursement.
- Service Providers may indicate other rates for ECDC's consideration

Table A:

Item	Description	Rate per Hour	Rate per Day
1.	Senior Consultant		
2.	Consultant		
3.	Project Lead		
4.			
5.			

Annexure E - (SBD 4): BIDDER'S DISCLOSURE

Note: Mandatory Requirement. Failure to complete and Sign this document will result in the bid being non responsive.

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 <input type="checkbox"/> No <input type="checkbox"/>
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2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/director/trustees/shareholders/members/partners or any person having a controlling interest in the enterprise, in table below:

Full Names	
Identity Number	
Name of the 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 <input type="checkbox"/> No <input type="checkbox"/>
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2.2.1 If so, furnish particulars:

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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2.3.1 If so, furnish particulars:

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:

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.

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

ANNEXURE F: STATEMENT OF CONSENT TO DATA PROCESSING

In terms of the provisions of the Protection of Personal Information Act, 2013 (Act No. 4 of 2013)

1. I, _____ (full names of the **client/applicant**),

Identitynumber _____ (“**the applicant**”)

do hereby grant my consent to the Eastern Cape Development Corporation (“the ECDC”) and its appointed processor to process my personal data for the purpose of any or all of the undermentioned actions, being the legitimate reasons for processing and/or using my personal data.

- 2. I accept that my personal information will only be utilized for the purposes it was collected, that the information will only be retained for as long as is necessary and required by law, and that I have the right to view such information at any time, as well as requested correction or deletion of my personal information held by the ECDC.
- 3. I am aware that I may withdraw my consent at any time by using the relevant Data Subject Consent Withdrawal Form.
- 4. I herewith consent to the ECDC official / staff member / employee or agent collecting and having access to my personal information.
- 5. I expressly consent to the ECDC official / staff member / employee or agent to collect and process this information for the purpose of **considering my application for funding / leasing / employment alternatively for considering our bid document**.
- 6. I expressly consent to the ECDC or its official / staff member / employee or agent having access to my personal information contained in my application for lease, employment, funding, my bid document or any other administrative document required by the ECDC for processing.
- 7. I expressly consent to the ECDC or its official / staff member / employee or agent using my personal information to communicate with me in person / via telephone / email / video call / fax / WhatsApp / any form of social media.
- 8. I expressly consent that the ECDC or its official / staff member / employee or agent may discuss any of my personal information with any of its officials / staff members / employees or agents that may at any stage of my application be involved in considering same and forward any such information to any ECDC relevant committee or forum.
- 9. I expressly consent to the ECDC or its official / staff member / employee or agent **handing over any outstanding accounts to debt collection third parties (applicable to properties/development finance and business support unit)**.
- 10. I expressly consent to the ECDC or its official / staff member / employee or agent handing over my personal information for purposes of verification of my credit profile or record, references or any purpose required in terms of the law.

SIGNATURE of the DELEGATED AUTHORITY		DATE	
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