

REQUEST FOR QUOTATION

TERMS OF REFERENCE FOR A STUDY ON: THREATS TO INDUSTRIALISATION	
RFQ NUMBER:	REQ10477
RFQ ISSUE DATE:	02 August 2022
CLOSING DATE AND TIME:	15 August 2022 @ 11h00
RFQ VALIDITY PERIOD	
DESCRIPTION OF SERVICES	To invite bids for a study on the current threats to Industrialisation in South Africa, and the drivers and levers that predominate in the deindustrialisation of South Africa and the implications thereof for South Africa NB : Terms of Reference attached from page 19 for reference
SUBMISSION ADDRESS	Submissions to be sent electronically
PROCUREMENT ENQUIRIES	Name: JOYCE TONGWANE 060771 0485 Email: joyce@nedlac.org.za
TECHNICAL ENQUIRIES	Name : Judy Blom 0824423626 Email :judy@nedlac.org.za

BIDDER NAME:

COMPANY REGISTRATION NUMBER:.....

CSD NUMBER :.....

ADDRESS:
.....
.....

CONTACT PERSON :

TEL:

FAX:

E-Mail :

Mobile:

TOTAL RFQ PRICE R(VAT Incl.)

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:

2.3 Position occupied in the Company (director, trustee, shareholder²):

2.4 Company Registration Number:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

²"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.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:
Name of state institution at which you or the person connected to the bidder is employed :
Position occupied in the state institution:

Any other particulars:
.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

.....

.....
.....

2.10 Are you, or any person connected with the bidder, **YES/NO**
aware of any relationship (family, friend, other) between
any other bidder and any person employed by the state
who may be involved with the evaluation and or adjudication
of this bid?

2.10.1 If so, furnish particulars.
.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members **YES/NO**
of the company have any interest in any other related companies
whether or not they are bidding for this contract?

2.11.1 If so, furnish particulars:
.....
.....
.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Reference Number	Tax	State Employee Number / Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

1. SBD 8 - DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1 This Standard Bidding Document must form part of all bids invited.

2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-

- a. abused the institution's supply chain management system;
- b. committed fraud or any other improper conduct in relation to such system;
- or
- c. failed to perform on any previous contract.

4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	<p>Yes</p> <p><input type="checkbox"/></p>	<p>No</p> <p><input type="checkbox"/></p>
4.1.1	<p>If so, furnish particulars:</p>		

4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME).....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Name of Bidder

.....

Position

.....

Date

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

- 1. I have read and I understand the contents of this Certificate;
- 2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
- 3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
- 4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
- 5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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 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.

10. 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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Js914w 2

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids/quotations:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

a) The value of this bid/quotations is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

1.3 Points for this bid/quotation shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

1.5

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.6 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.7 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated

or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20

or

90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)
 (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
-----	--	----	--

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME	QSE
	√	√
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

- Manufacturer
- Supplier
- Professional service provider
- Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

WITNESSES

1.

2.

.....

SIGNATURE(S) OF BIDDERS(S)

DATE:

ADDRESS

TRADE AND INDUSTRY CHAMBER

TERMS OF REFERENCE FOR A STUDY ON: THREATS TO INDUSTRIALISATION

To invite bids for a study on the current threats to Industrialisation in South Africa, and the drivers and levers that predominate in the deindustrialisation of South Africa and the implications thereof for South Africa.

1. PURPOSE

- 1.1. The purpose of the study is to identify, assess, and make recommendation on the threats to industrialisation in South Africa and the manner in which these can be countered, given the existing incentives, policies and legislative instruments that exist in the country. The study will provide recommendations on the appropriate steps to enhance industrialisation, and what trade and industrial policy measures that South African organised Labour, organised Business and Government policy-makers can utilise to strengthen or change, in order to promote competitive South African industrialisation.

2. BACKGROUND

- 2.1. The South African government has a number of policy instruments that underpin South Africa's industrial strengthening and economic recovery. Specifically, the National Development Plan's goals of reducing unemployment, poverty and inequality, and the interventions contained in the Re-Imagining Industrial Strategy which was presented by the Minister of Trade, Industry and Competition, Mr E Patel and approved by Cabinet in June 2019; and the Economic Reconstruction and Recovery Plan (post the start of Covid-19 in South Africa) which has as an overarching goal, to create a sustainable, resilient and inclusive economy.
- 2.2. The dire economic situation that faces South Africa is well known: high unemployment, poverty and inequality; constrained fiscal space; low investment in the South African economy; skills shortages; the effects of Covid-19 locally and internationally; contractions in real Gross Domestic Product which has pushed the country into a technical recession, etc. Binding constraints on manufacturing such as electricity supply, logistics, port tariffs, regulatory burdens etc pose a big threat against re-industrialisation. Persistent structural challenges remain which should be addressed in order to have a meaningful impact to re-industrialize.
- 2.3. Unemployment, poverty and inequality are outcomes of the dire economic situation. First and foremost, must be South Africa's imperative to create a conducive environment for investment. This conducive environment is a complex of policies, infrastructure (and network industries), rule of law, state capability, competitive business environment, property rights, governance.
- 2.4. Furthermore, as a result of the Covid-19 pandemic, a total national lockdown was declared in March 2020 which led to the complete shutdown in certain industries. There were industries that were declared essential due to the nature of service/products they provide, and these remained largely operational. The lockdown also led to the complete shut-down of the borders, which impacted significantly on exports and imports, and road freight. The COVID-19 pandemic has led to disruptions in reliability in global supply chains with a resultant push to localisation and alternative solutions to restore reliability in supply.
- 2.5. It is against the background described above, that serious and urgent concerns have been raised by the social partners at the Nedlac Trade and Industry Chamber. South

Africa currently faces a number of threats to industrialisation and economic recovery. The spotlight has focussed on salient issues: namely:

- 2.5.1. the emergence and effects of the Covid-19 pandemic and;
- 2.5.2. the opportunistic corruption and non-compliant practices by unscrupulous operators and the damaging effect of some companies abusing Section 189 of the Labour Relations Act to retrench workers. The Nedlac Reference Group working with the researcher, will guide the researcher on additional persons to consult. and
- 2.5.3. the failed attempted domestic insurrection that was predominantly evident in Gauteng and Kwa Zulu/Natal provinces in July 2021, with rampant violence and looting of businesses, targeted and random destruction of property and infrastructure; and significant loss of life;
- 2.5.4. the lack of local manufacturing capacity within South Africa to meet volumes, even with localisation prescripts and designated products, and to be able to compete with imported products;
- 2.5.5. The African Continental Free Trade Agreement, whereby trading started in January 2021 will further add pressure on the local sectors as imported products from the rest of Africa flow into South Africa.
- 2.6. These crises have resulted in government diverting fiscal allocations to deal with the emergency priorities; with various interventions put in place by provinces, Parliament and the social partners.
- 2.7. This context does not serve to attract foreign and especially local investment in South Africa: South Africa's big failure in growing the economy are related to SA investment levels which are generally low and the researchers should do a desk top overview of commitments made to the R100billion target and investments secured leading up to the Investment Summit 2022 and the reasons where commitments have not been met.

3. OBJECTIVES

The objectives of this study are to:

- 3.1. To identify and assess the nature and extent of deindustrialisation in South Africa;
- 3.2. To determine the threats to and their impact on re-industrialisation in South Africa, and on potential localisation initiatives;
- 3.3. To recommend steps that can halt the threats to industrialisation in South Africa, including any trade and industrial policy measures, network industries as well as other policy responses that should be developed to ensure that South Africa's producers effectively compete on a level playing field with South Africa's trading partners and competitors.

4. METHODOLOGY

- 4.1. Bidders must clearly stipulate the methodological approach that will be followed to conduct this analysis and clearly stipulate what research methods and techniques will be used, why the specific methods and techniques are proposed, what advantage, disadvantage and risk factors there are.

- 4.2. It is expected that the study will employ mixed research methods. It is anticipated that data will dominantly be collected from secondary sources and that a significant amount of time will be spent on analysis. Secondary information should be sourced from a diverse list of documents including trade agreements, policies and legislation, documents issues by the social parties and financial and trade data and reports etc. An appointed bidder will be required to draw a comprehensive list of secondary sources that will be consulted on, and present this list to the Trade and Industry Chamber members during the project inception phase.
- 4.3. In addition, a detailed project implementation plan outlining key activities, timelines and outputs must be submitted with the bid.

5. DELIVERABLES

- 5.1. The project inception report must be submitted no later than 5 days after an inception meeting between the service provider and the Nedlac Research Reference Group.
- 5.5. Regular project progress reports and meetings as will be agreed to between the service provider and the Nedlac Research Reference Group.
- 5.6. A detailed draft final report covering the scope of work as outlined. The service provider will need to present the research to the Trade and Industry Chamber at Nedlac.
- 5.7. Final report should be submitted as follows:
 - a) Electronic final report in word and pdf formats with key data (hyperlinked and searchable); and a content-heavy power-point presentation to be emailed to the Nedlac Secretariat of the Trade and Industry Chamber.

6. QUALIFICATIONS, EXPERIENCE AND EXPERTISE

The successful consultants must meet the following minimum qualifications and experience requirements:

- 6.1. The successful bidder would need to detail their qualifications and experience in carrying out research of this nature.
- 6.2. Bidders must submit comprehensive CVs of all proposed key staff. A table summarising the qualifications and experience of the proposed team must be provided.
- 6.3. Where proposed team members hold foreign qualifications, certified copies of South African Qualifications Authority *certificates of evaluation* must be submitted
- 6.4. The bidding company must have 5 years' relevant experience in delivering the required service. Proof of relevant experience should be provided.
- 6.5. NB: Nedlac reserves the right to vet all documentation and information provided by bidders to prove their relevant experience and ability to perform the service.
- 6.6. Bidders must ensure that their tax matters are in order with SARS.

7. SUBMISSION OF DOCUMENTS

- 7.1. Bidders must submit the following documents:
 - 7.1.1. A proposal on how they will respond to the brief above with a project plan which must be aligned to a pricing schedule, which fully and clearly sets out the breakdown of costs in respect of all items to be charged. The quotation should include all costs for this work inclusive of VAT.

- 7.1.2. CV's and qualifications of the relevant individual/s which must clearly demonstrate the individual's necessary skills and experience.
- 7.1.3. The service provider must have at least 5 years of experience in respect of facilitating similar projects.
- 7.1.4. Provide reference letters from clients confirming projects of a similar nature had been completed, including the following information per project:
 - i. Project name;
 - ii. Project objectives; and
 - iii. Duration of the project;
 - iv. Contactable numbers
- 7.2. The following statutory documents:
 - 7.2.1. Submission of the BBBEE certificate or sworn affidavit; and
 - 7.2.2. Submission of print out of National Treasury, Central Supplier Database Summary Report;
 - 7.2.3. Proof of good standing with SARS.

8. BID SUBMISSION AND ENQUIRIES

- 8.1. Proposals should be submitted to Joyce@nedlac.org.za by the 10th August 2022 at 11h00.
- 8.2. Any technical questions regarding the RFP should be emailed to judy@nedlac.org.za
- 8.3. Note that no late proposals will be considered.
- 8.4. Nedlac reserves the right to cancel this bid should such be deemed necessary.
- 8.5. Nedlac pays the service provider 30 days upon receipt of invoice.

9. SELECTION AND EVALUATION CRITERIA

8.6. The evaluation criteria for functionality are set out in the table below.

8.7. The scoring to evaluate the criteria will be as follows:

- 5= Excellent, 4 = Good, 3 = Satisfactory, 2 = Poor, 1= Unacceptable

8.8. Bidders need to score a minimum of 70% for functionality before BBEE and price are considered.

Functionality Criteria	Guide to scoring	Weight
A. Approach and methodology in managing this project which should include: Interpretation of Terms of Reference to demonstrate understanding of what is required:		
Excellent understanding of what is required in the terms of reference; high quality and innovative project proposal and project plan.	5 = Excellent	30%
Good understanding of what is required in the terms of reference; quality project proposal and project plan.	4 = Good	
Satisfactory understanding of what is required and satisfactory project proposal and project plan.	3 = Satisfactory	
Poor understanding of what is required in the terms of reference and poor project proposal and project plan.	2 = Poor	
No project proposal and plan.	0 = Not Acceptable	
B. Relevant Experience	Guide to scoring	Weight
The expert has more than 5 years of experience in respect of concluding research studies.	5 = Excellent	30%

The expert has at least 4 to 5 years of experience in respect of undertaking similar projects	4 = Good	
The expert has at least 3 to 4 years of experience in respect of undertaking similar projects	3 = Satisfactory	
The expert has below 3 years of experience in respect of undertaking similar projects	2 = Poor	
The expert has below 2 years of experience in respect of undertaking similar projects	1=Not acceptable	
C. Similar Projects Completed	Guide to scoring	Weight
5 or more reference letters	5 = Excellent	20%
4 reference letters	4 = Good	
3 reference letters	3 = Satisfactory	
2 reference letters	2 = Poor	
1 reference letters	1 = Not Acceptable	

D. Qualifications	Guide to scoring	Weight
The expert has a minimum qualification - Post graduate degree in Public Administration, Economics, Finance, or related qualification.	5 = Excellent	20%
The expert has a graduate degree in Public Administration, Economics, Finance, or related qualification.	4 = Good	
The expert has and a minimum qualification - diploma in Public Administration, Economics, Finance, or related qualification.	3 = Satisfactory	
The expert has a minimum qualification – Certificate in Public Administration, Economics, Finance, or related qualification.	2 = Poor	

The expert has a minimum qualification – no qualification.	1=Not acceptable	
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