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LOCALISATION SUPPORT FUND NPC

REQUEST FOR PROPOSAL

**YOU ARE HEREBY INVITED TO SUBMIT A PROPOSAL FOR THE REQUIREMENTS OF THE
LOCALISATION SUPPORT FUND (LSF) NPC**

RFP NUMBER:	RFP_25_020_MARKET RESEARCH TO SUPPORT VALUE CHAIN DEVELOPMENT WITHIN THE RAIL TRANSPORT EQUIPMENT SECTOR	
RFP ISSUE DATE:	15/10/2025	
CLOSING DATE AND TIME:	29/10/2025 at 16:30 pm	
RFP OFFER TO REMAIN VALID FOR A PERIOD OF	120 Days	
DESCRIPTION:	This study will assess South Africa's rail manufacturing and maintenance ecosystem with the objective of aggregating demand, evaluating supply capabilities, and recommending policy, procurement, and export strategies to unlock local industrial growth and improve the competitiveness of the domestic rail sector.	
RESPONSES TO THIS RFP SHOULD <u>ONLY</u> BE SENT VIA EMAIL TO:	info@lsf-sa.co.za	
NB: All responses must be sent to the above-mentioned e-mail address and late responses will not be considered.		
ENQUIRIES	Can be addressed to: info@lsf-sa.co.za	
INTENTION TO PARTICIPATE	Please confirm your intention to participate in this RFP process via email to leonn@lsf-sa.co.za by 21/10/2025	

NB: All enquiries regarding this RFP must be forwarded to the above-mentioned contact email address within five (5) business days after the RFP has been issued. Please note that all questions and subsequent responses received in the five days will be shared with all bidders as a complete list to ensure transparency. No enquiries from bidders will be entertained after the closing date of this RFP and during the subsequent evaluation processes. LSF however reserves the right to clarify any information with any bidder regarding their response to this RFP.

SECTION 1: SCOPE OF WORK AND TECHNICAL REQUIREMENTS

1. SPECIAL INSTRUCTIONS TO BIDDERS

Bidders shall provide full and accurate answers to the questions posed in this document, and, where required explicitly state “Comply/Not Comply” regarding compliance with the requirements. Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/ technical requirements. All documents as indicated must be supplied as part of the bid response. Bidders must clearly specify the workstreams they are submitting bids for in Section 5 of their response.

2. PROJECT BACKGROUND AND OBJECTIVE

2.1 Background

The Localisation Support Fund (LSF) is a South African non-profit and public benefit organisation dedicated to advancing strategic localisation in manufacturing and key value chains. LSF collaborates with demand- and supply-side stakeholders to unlock localisation opportunities through industry research and technical expertise. Its goal is to drive industrial development by enhancing manufacturing competitiveness.

Building on this foundation, the LSF has partnered with the African Rail Industry Association (ARIA) and the Department of Trade, Industry and Competition (the dtic) to advance localisation within South Africa’s rail transport equipment sector. As part of this collaboration, the partners have identified the need for a focused assessment of the rail manufacturing and maintenance ecosystem to aggregate demand across entities such as Transnet, PRASA, and Gautrain; evaluate local supply capabilities; and recommend policy, procurement, and export strategies to unlock industrial growth and competitiveness in the rail sector.

The rail transport equipment sector is a critical enabler of South Africa’s industrialisation and logistics performance. Despite having a capable industrial base, the sector remains fragmented and underutilised, with high reliance on imports for high-value components. In 2024 alone, South Africa imported over R2.5 billion in rail transport equipment, including R1.6 billion in locomotive parts. This presents a significant opportunity to localise production and build globally competitive capabilities.

To this end, the Localisation Support Fund seeks to appoint a suitably qualified service provider to undertake a Market Research Study to Support Value Chain Development within the Rail Transport Equipment Sector, which will provide the evidence base to inform coordinated industrial development, policy design, and procurement reforms across the rail value chain.

2.2 Objective

The LSF, in collaboration with the ARIA and the DTIC, is commissioning a comprehensive market study to support the development of local content designation thresholds for the rail transport equipment sector under the Public Procurement Act (2024).

The primary objective is to assess the current and future potential of South Africa’s rail manufacturing and maintenance ecosystem through five strategic focus areas:

- **Aggregating and forecasting demand** across public and private rail operators to create scale and investment certainty.
- **Mapping and evaluating local supply capabilities** to identify gaps, opportunities, and readiness for localisation.
- **Reviewing and strengthening policy instruments** to support designation and industrial growth.
- **Providing strategic guidance to regulators and buyers** on preserving local capacity during rail liberalisation.

- **Identifying procurement and export opportunities** to support long-term competitiveness and regional integration.

Specifically, the study aims to:

- Develop a 10-year demand forecast for rail components and maintenance services.
- Map the current supplier landscape and assess industrial readiness.
- Recommend realistic and phased local content thresholds for key components and services.
- Evaluate the effectiveness of existing policy tools (e.g., designation, NIPP, CSDP) and propose enhancements.
- Provide strategic recommendations for managing localisation during rail sector liberalisation.
- Identify procurement models and collaboration frameworks that support localisation.
- Map export opportunities and outline requirements for supplier development and standards alignment.
- Deliver a roadmap for designation implementation, including investment needs, policy support, and monitoring mechanisms.

The study will generate evidence-based insights to inform policy, procurement, and investment decisions, with the goal of fostering a competitive, resilient, and export-ready rail manufacturing sector in South Africa.

3. TERMS OF REFERENCE

3.1 Study Components

The study will be structured around five integrated workstreams:

3.1.1 Workstream 1: Demand-side Mapping

This workstream aims to forecast the 10-year demand for rail components and maintenance services in South Africa across public and private operators.

Key Activities:

- Analyse expansion and refurbishment plan of Transnet, PRASA, Gautrain, and other entities.
- Map and estimate volumes and values of components and services likely to be in demand (e.g., rolling stock, track, signalling, electrification).
- Identify priority components for localisation based on volume, value, and strategic relevance.

Deliverables:

- 10-year demand forecast report.
- Component and service demand map.
- Priority localisation opportunity list.

3.1.2 Workstream 2: Supply-side Capability Assessment

Assess existing local manufacturing and maintenance capabilities and readiness to meet future demand.

Key Activities:

- Identify current suppliers, production volumes, and service providers.
- Evaluate capacity, technology readiness, and scalability.
- Map geographic and value chain distribution of capabilities.

Deliverables:

- Supplier and service provider capability matrix.
- Industrial readiness and gap analysis
- Localisation feasibility analysis.

3.1.3 Workstream 3: Policy Instrument Review

Evaluate current and potential policy tools to support localisation and recommend improvements.

Key Activities:

- Review instruments such as designation (Public Procurement Act), NIPP, CSDP, and DTIC incentives.
- Assess efficacy, gaps, and implementation challenges.
- Recommend enhancements or new instruments to support designation and industrial growth.

Deliverables:

- Policy instrument toolbox and evaluation report.
- Recommendations for designation thresholds and supporting mechanisms.
- Implementation framework for policy reform.

3.1.4 Workstream 4: Strategic Guidance for Rail Sector Transformation

Advise regulators and buyers on how to preserve and grow local manufacturing capacity during rail sector liberalisation.

Key Activities:

- Analyse risks of demand fragmentation and cost impacts on localisation.
- Identify principles and guidelines for maintaining industrial capacity.
- Recommend coordination mechanisms across buyers and regulators.

Deliverables:

- Strategic guidance document for regulators and buyers.
- Risk mitigation framework for localisation during liberalisation.

3.1.5 Workstream 5: Procurement Evolution and Opportunity Mapping

Empower buyers and suppliers to adapt to a changing procurement landscape and engage in strategic localisation.

Key Activities:

- Identify procurement models that support localisation (e.g., long-term contracts, strategic sourcing).
- Recommend collaboration frameworks between buyers and suppliers.
- Map opportunities for joint ventures, technology transfer, and supplier development.

Deliverables:

- Strategic procurement opportunity map.
- Buyer-supplier engagement guidelines.
- Recommendations for enabling strategic procurement.

3.2 Methodology

Bidders should propose a robust methodology, but it is anticipated that the study will require a mixed-method approach combining:

- **Desk Research:** Analysis of trade data, procurement records, policy documents, and industry reports, etc.
- **Stakeholder Consultations:** Structured interviews and validation workshops with:
 - Government departments
 - SOEs
 - Industry associations
 - Manufacturers and suppliers of rail equipment and components, and those in adjacent industries
 - Maintenance service providers in rail and adjacent industries
 - Regulatory bodies
- **Economic Analysis:** Assessment of current market size and growth projections, economic impact potential, cost-benefit analysis, scenario modelling, etc.
- **Benchmarking and Case Studies:** Comparative analysis of international designation models and localisation strategies.

3.3 Reporting Requirements and Deliverables

- Present a project kick-off document on project commencement
- Submit an Inception Report within 2 weeks of project commencement
- Provide Monthly Progress Reports and participate in monthly steering committee meetings – detailing activities, findings, and challenges
- Deliver Draft findings for each workstream for steering committee review and feedback
- Present findings at Stakeholder Workshops – stakeholder working group confirmed at start of project
- Submit a comprehensive Final Report including
 - Demand and supply-side analysis
 - Capability and feasibility assessment
 - Policy instrument review and reform recommendations
 - Strategic guidance for liberalisation and procurement evolution
- Participate in a Close-Out Presentation to LSF, DTIC, and ARIA
- Prepare executive summaries and presentation materials for key stakeholders
- Produce a public-facing final report for broader public distribution and benefit, including presentation of project findings at a roundtable event

4. PROJECT TIMELINES

Project Duration: 6 months

5. EVALUATION CRITERIA

5.1 Other Technical Requirements

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

5.1.1 BIDDER'S EXPERIENCE	Comply	Partially Comply	Not Comply
The bidder must demonstrate relevant experience in providing Services with a specific focus on research of this nature. The bidder must provide a minimum of two (2) relevant contactable references of where they have executed similar projects of similar scale, within the past five (5) years. Please refer to Table (a) of Annexure 2 of this document for the format in which the required information must be provided.			
Substantiate / Comments			

5.1.2 BIDDER'S PROPOSED METHODOLOGY	Comply	Partially Comply	Not Comply
The bidder must demonstrate a thorough understanding of the objectives and deliverables of this project. The bidder must provide a detailed proposal of the methodology/ approach to be used to carry out the scope of work outlined. The methodology must be relevant to the area of operations of the proposed research, i.e. Rail Sector/Rail Components			
Substantiate / Comments			

5.1.3 PROJECT MANAGEMENT AND CO-ORDINATION PLAN	Comply	Partially Comply	Not Comply
The bidder must provide a detailed project management plan which must include but not be limited to activities/ tasks, roles and responsibilities, deliverables, time frames and reporting framework.			
Substantiate / Comments			

5.1.4 QUALIFICATIONS, SKILLS AND EXPERIENCE OF THE PROPOSED PROJECT IMPLEMENTATION TEAM	Comply	Partially Comply	Not Comply
The bidder must submit, as part of its proposal, the following: - The structure and composition of the proposed team clearly outlining the qualifications and experience of the key personnel in relation to the relevant expertise required for successful delivery of the project. Please refer to Table (b) of Annexure 2 of this document for the format in which the required information must be provided. - CVs of the team and key personnel and the CVs must clearly highlight qualifications, relevant areas of experience/ competence and track records in relation to this project.			
Substantiate / Comments			

5.1.5 PRESENTATIONS	Comply	Not Comply
The bidder shall be expected to present their proposed solution to a panel of evaluators. The presentation should cover the practical aspects of how the study, in the context of the scope of requirements, will be implemented over the project duration. Previous case studies of practical implementation must also be included.		
Substantiate/Comments		

SECTION 2: TERMS AND CONDITIONS OF REQUEST FOR PROPOSAL (RFP)

1. No services must be rendered, or goods delivered before an official LSF Purchase Order form has been received.
2. Late and/ or incomplete submissions (i.e., submissions which do not include relevant information for adjudication) will not be accepted.
3. Completion and signing of this RFP template and input sheet(s).

4. Tax clearance requirements:

It is the responsibility of the bidder to ensure that they are registered for Tax and the Tax clearance certificate is submitted.

5. B-BBEE Requirements*:

Bidders are required to submit a B-BBEE verification certificate indicating the contribution level of the bidding entity. For Exempted Micro Enterprises (EME) with an annual revenue of less than R10 million and Qualifying Small Enterprises (QSE) with an annual revenue of between R10 million and R50 million per annum, a sworn affidavit confirming the annual total revenue and level of black ownership may be submitted. Any misrepresentation in terms of the declaration constitutes a criminal offence as set out in the B-BBEE Act as amended.

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

**Applicable to South African registered companies/entities*

6. Price

All prices must be proposed in South African Rand (ZAR) and **MUST** be firm for the RFP validity period. Period of price validity must be explicitly stated.

7. Reasons for disqualification

LSF reserves the right to disqualify any bidder which does any one or more of the following:

- a) Bidder who does not have a Tax Compliant status on the closing date and time of the bid.
- b) Bidder who submitted incomplete information and documentation according to the requirements of this RFP.
- c) Bidder who submitted information that is fraudulent, factually untrue or inaccurate, for example memberships that do not exist, BEE credentials, experience, etc.
- d) Bidder who received information not available to other vendors through fraudulent means.
- e) Bidder who does not comply with any *other requirements* as stipulated in this RFP document.
- f) Bidder who submits the proposal/ proposal to any email other than info@lsf-sa.co.za. NB: Only bid/RFP enquiries sent to the email address of the Procurement Manager within three (3) business days will be attended to. No bid proposals or late enquiries sent to the email address of the Procurement Manager will be entertained.

8. LSF reserves the right to cancel or reject any proposal and not to award the RFP to the lowest bidder or award parts of the RFP to different bidders, or not to award the RFP at all.
9. The LSF reserves the right to award this bid as a whole or in part.
10. The LSF reserves the right to request all relevant information, agreements, and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the LSF to conduct background checks, including FICA verification, on the bidding entity and any of its directors / trustees / shareholders / members.

11. The LSF reserves the right of final decision on the interpretation of its RFP requirements and responses thereto.
12. The bidder hereby accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.

13. Response Format (Returnable Documents)

Bidders shall submit their bid responses in accordance with the response format specified below:

- a) Executive summary (explaining how you understand the requirements of this RFP and the summary of your proposed solution).
- b) CIPC company registration document.
- c) Valid Tax Clearance certificate and/ or proof of application as endorsed by SARS and/ or SARS issued Tax Verification pin code.
- d) BBBEE certificate or sworn affidavit for EMEs and QSEs.
- e) Subcontracting commitments (if applicable).
- f) Section 1 of this RFP document (duly completed and signed).
- g) Section 2 of this RFP document (duly completed).
- h) Section 3 of this RFP document (duly completed and signed).
- i) Annexures 1 – 6 of this RFP documents (duly completed and signed).
- j) Any supporting documents to substantiate responses to evaluation criteria.

Name of your Company (in block letters)

Signature(s) of the authorised person(s)

Date:

Name of person signing (in block letters)

Capacity

Are you duly authorised to sign this Bid?

Company Registration Number

VAT Registration Number

Postal address (in block letters)

Physical address (in block letters)

Domicilium citandi et executandi in the RSA (full street address) (in block letters)

Contact person: _____

Telephone Number: _____ Fax Number: _____

Cell phone Number: _____

e-mail: _____

14. EVALUATION CRITERIA

Bidders shall be evaluated in terms of the following parameters:

- Mandatory Functional/ Technical Requirements.
- Other Functional/ Technical Requirements.
- Price
- BBBEE Score (where applicable)

14.1 Mandatory Functional/ Technical Requirements

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

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

14.2 Other Functional/ Technical Requirements

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

CRITERIA	WEIGHT
Bidder's Experience	25%
Proposed Methodology	20%
Project Management and Co-ordination Plan	15%
Qualifications, Skills and Experience of the proposed Project Implementation Team	25%
Presentations	15%
TOTAL	100%

Note: The minimum qualifying score for functionality is 70%. Bids that fail to achieve the minimum qualifying score on functionality will not be considered for further evaluation.

14.3 Award Criteria

All bidders that shall achieve the minimum qualifying score (acceptable bids) will be evaluated further and the following criteria shall apply when determining the awarding decision:

- Price comparison and associated payment terms.
- BBBEE score (where applicable)

SECTION 3: Cost Proposal

Please indicate your total bid price here: R _____ (including VAT)

NOTE: All prices must be VAT inclusive and must be proposed in South African Rand (ZAR).

Are the rates proposed firm for the full period of the contract?

YES	NO
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Important: If not firm for the full period, provide details of the basis on which price adjustments shall be applied e.g. CPI (Consumer Price Index), clearly indicating the formula, indices and base period etc.

All additional (other) costs associated with the bidder's offer must be clearly specified and included in the total bid price.

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

Payments will be linked to specified deliverables and/or milestones. Invoicing may proceed after such deliverables have been approved by LSF. Payments are made 30 days after receipt of invoice	Comply	Not Comply

COSTING MODEL: PROVIDE A BREAKDOWN OF THE PROPOSED COSTS

Bidders must submit a costing schedule that is linked to the deliverables of this project. The breakdown of costs must be presented in the format below. *(Bidders are allowed to compile costing on an Excel sheet if the space in the table below is not sufficient.)*

Table A – Bus Localisation Study

Activity/ Deliverable	Resource(s)	Hourly rate per resource	No. of hours	Cost (excl. VAT)
Sub-Total (A) (excl. VAT)				
Sub-Total (A) (incl. VAT)				

Table B - Disbursements

The bidder must provide a detailed breakdown of Disbursements (if any) below:

Cost Element	Cost (incl. VAT)
Total Disbursements (B) (incl. VAT)	

Note on pricing:

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

Total Bid Price (A + B) (incl. VAT)	
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SUMMARY OF THE PROPOSAL

DESCRIPTION	BIDDER'S PROPOSAL
Number of resources (personnel)	
Project duration (in hours)	
Project duration (in weeks)	

Price Declaration Form

Dear Sir,

Having read and examined the Request for Proposal (RFP) Document, **RFP_25_020**, the General Conditions, the Requirements, and all other Annexures to the RFP Document, we offer to provide technical expertise to conduct the Workstream Specific Research and/or Data Consolidation at the following price.

R _____ (including VAT)

In words

R _____ (including VAT)

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

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

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

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

SIGNED _____ **DATE** _____

(Print name of signatory) _____

Designation _____

FOR AND ON BEHALF OF: COMPANY NAME _____
Tel No _____
Cell No _____
Email _____

Annexure 1 - Supply chain management practices questionnaire

Request for Proposal No: _____
Name of Respondent: _____
Authorised signatory: _____

[Note to the Respondent: The Respondent must complete the information set out below. If the Respondent requires more space than is provided below it must prepare a document in the same format setting out all the information referred to below and return it with the bid.]

The Respondent must complete the following questionnaire.

Respondent's past supply chain management practices:

Item	Question	Yes	No
1.2	Was the Respondent 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 ☐	No ☐
	If so, provide particulars:		
1.3	Does the Respondent relate to any LSF employee or part of LSF current or past staff (employee) establishment?	Yes ☐	No ☐
	If so, provide particulars:		

I, _____ (print name) hereby certify that the information, facts and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company:

Company Registration Number:

Company VAT Registration Number:

Signature

Date

Annexure 2 - Response Format for Section 2

Bidder's Experience and the proposed Project Team

Request for Proposal No: _____

Name of Bidder: _____

Authorised signatory: _____

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

The bidder must provide the following information:

Table (a) Details of the bidder's experience in conducting market studies of this nature, preferably in the Rail/ Automotive sector. (Refer to Section 2 paragraph 5.1.1)

Client Name	Project description	Industry/ Sector	Project period (Start and End Dates)	Description of services performed and role of the Bidder	Name, title and telephone contact of client

Table (b) Details of the key personnel of the bidders' proposed team (Refer to Section 2 paragraph 5.1.4):

Name	Position	Role/ Duties in this Project	Relevant Project Experience	
			Project description and Client name	Project duration (weeks)

Annexure 3 - Certificate of Independent Bid Submission

I, the undersigned, submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by: **The Localisation Support Fund (LSF)**

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 organisation, 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 consortium¹ will not be construed as collusive bidding.
7. 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.

¹ 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.

.....

.....

Signature

Date

.....

.....

.....

Position

Name of Bidder

Annexure 4 – Declaration of Interest

1. Any legal person, including persons having a kinship with persons employed by the LSF, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price proposal, 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 LSF, 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 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. **To give effect to the above, the following questionnaire must be completed and submitted with the bid.**

- 2.1. Are you or any person connected with the bidder **YES / NO**
presently employed by the LSF?

- 2.1.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Position occupied in the LSF:

Any other particulars:

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

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

- 2.1.3 If so, furnish particulars:

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

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

- 2.2.1 If so, furnish particulars.

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

3. **DECLARATION**

I, the undersigned (name).....

Certify that the information furnished in paragraphs 2 and 3 above is correct. I accept that the LSF may reject the bid or act against me should this declaration prove to be false.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Annexure 5: Disclosure Statement

Disclosure Statement

In terms of the tender condition 10, which allows the LSF to conduct background checks on bidders and its shareholders and directors, the LSF hereby requires bidders to provide the following additional information:

- 1.1 The LSF considers the integrity of its appointed service providers to be of critical importance. The LSF reserves the right to disqualify from further consideration any bidder whose integrity, based on past conduct (during the 5 years immediately preceding the bid submission date), it considers questionable.
- 1.2 To this end, the LSF requires each bidder to include in its bid, a disclosure statement which details the following (with sufficient information and supporting documentation for the LSF to make its own assessment as to the materiality or seriousness of allegations regarding the bidder's integrity or conduct):
 - 1.2.1 any criminal charges made against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct.
 - 1.2.2 any civil proceedings initiated against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct; and
 - 1.2.3 any other enquiry or similar proceedings initiated or threatened against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct.
- 1.3 Where the bidder is a consortium, the disclosure statement referred to in paragraph 1.2 above must be made separately in respect of each consortium partner
- 1.4 In the event that the bidder's circumstances change, after submission of its bid, regarding any matter referred to in paragraph 1.2 above or regarding any matter referred to in its disclosure statement, the bidder must submit a written notification to LSF indicating the nature and extent of such changed circumstances.
- 1.5 The LSF reserves the right to seek such additional information from any bidder, in respect of the disclosure statement referred to in paragraph 1.2 above, as it may, in its sole discretion, determine, whether such information has been requested under this RFP or otherwise, and may require the bidder to make oral presentations for clarification purposes or to present supplementary information, in respect of the disclosure statement if so required by the LSF.
- 1.6 Based on its own assessment of the contents of the bidder's disclosure statement and any publicly available information which is relevant to the contents of such disclosure statement, the LSF will decide whether the bidder's conduct or any allegations relating thereto pose a risk, reputational or otherwise, to the LSF; and if it reaches an adverse conclusion the LSF will in its sole discretion have the right to disqualify a bidder from further participation in the tender process. Disqualification on this ground may be done at any stage in the bid evaluation process prior to contract award.

Item	Question	Yes	No
2.1	Has there been any criminal charges made against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct?	☐	☐
2.2	Has there been any civil proceedings initiated against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct?	☐	☐
2.2	Has there been any other enquiry or similar proceedings initiated or threatened against the bidder or any of its directors, shareholders, or management officials regarding their professional conduct?	☐	☐
	If you answered "Yes" to any of the questions above, then please provide detailed particulars in a separate document and submit it with your bid.		

3. **DECLARATION**

I, the undersigned (name).....

Certify that the information furnished in the table above is correct. I accept that the LSF may reject the bid or act against me should this declaration prove to be false.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Annexure 6: Privacy & Protection of Personal Information Act 4 of 2013 Requirements

<i>Request for Proposal No:</i>	
<i>Name of Bidder:</i>	
<i>Authorised signatory:</i>	

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

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

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

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

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

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

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

RESPONSIBILITIES OF SUPPLIERS AND BUSINESS PARTNERS WHO ARE OPERATORS UNDER POPIA

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

Item	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	Yes	No
1.1	Accountability The respective clients, third parties, suppliers and operators and its members will ensure that the provisions of POPIA, the guiding principles outlined in the policy and all the measures that give effect to such provisions are complied with at the time of the determination of the purpose and means of the processing and during the processing itself. If an employee of the LSF or any person acting on behalf of the corporation who through their intentional or negligent actions and/or omissions fail to comply with the principles and responsibilities outlined, proper corrective measures will be applied.	Yes ☐	No ☐
1.2	Processing Limitation The respective clients, third parties, suppliers and operators and its members will ensure that information is only processed for a justifiable reason and processing is compatible with the purpose of the collection.	Yes ☐	No ☐
1.3	Purpose Specification All respective clients, third parties, suppliers and operators and its members will process personal information only for specific, explicitly defined, and legitimate reasons. The respective clients, third parties, suppliers and operators will inform LSF of reasons prior to collecting or recording their PI.	Yes ☐	No ☐
1.4	Further Processing Limitation Personal information will not be processed for a secondary purpose unless that processing is compatible with the original purpose. Thus, where the respective clients, third parties, suppliers and operators seek to process personal information it holds for a purpose for which it was originally collected, and where this secondary purpose is not compatible with the original purpose, respective clients, third parties, suppliers and operators will first obtain additional consent from the LSF.	Yes ☐	No ☐
1.5	Information Quality The respective clients, third parties, suppliers and operators will take reasonable steps to ensure that all personal information collected is complete, accurate and not misleading. Where PI is collected or received from third parties, the respective clients, third parties, suppliers and operators will take reasonable steps to confirm that the information is correct by verifying the accuracy of the information directly with the data subject or by way of independent sources.	Yes ☐	No ☐
1.6	Open Communication Reasonable steps will be taken by the respective clients, third parties, suppliers and operators to ensure that the LSF is notified of the purpose for which the information is being collected, used, and processed.	Yes ☐	No ☐
1.7	Security Safeguards It is a requirement of POPIA for responsible parties, business partners and operators to adequately protect personal information. LSF will need to review suppliers or business partner security controls and processes to ensure that personal information is compliant with the conditions of the lawful processing of personal information as set out in the POPIA. This would be continuous monitoring and review conducted by the LSF at its discretion.	Yes ☐	No ☐

Item	GUIDING CONDITIONS FOR PROCESSING PERSONAL INFORMATION	Yes	No
1.8	Data Subject Participation A data subject whose PI has been collected, stored, and processed by the respective clients, third parties, suppliers and operators must have communication channels to attend to may request for the correction or deletion of such information.	Yes ☐	No ☐

I, _____ (print name) hereby certify that the information, facts and representations are correct and that I am duly authorized to sign on behalf of the company.

Name of Company/ Entity: _____

Company/ Entity Registration Number: _____

Company/ Entity VAT Registration Number: _____

Signature (Company/ Entity Representative)

Date