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515- 2023

TERMS OF REFERENCE

REQUEST FOR PROPOSALS (RFP)

SUPPLY OF GLOBAL ONLINE OFFERING OF SERVICES FOR FOREIGN DIRECT INVESTMENT FLOWS

Advertisement Date: 5 August 2022

Closing Date: 6 September 2022 at 12:00

Submission Requirements:

All responses to be hand delivered (incl. by courier). Bid document must be separated in two envelopes. *Envelope 1* will include functionality and a memory stick with an electronic copy of functionality alone; and *Envelope 2* will include tender compliance documents and pricing and budget schedule.

Required by:

Wesgro: Research Unit

Enquiries and Responses to:

Janine Botha

Head of Research

Mobile number: +27(0) 82 351 9306

janine@wesgro.co.za

Delivery address:

Wesgro Tender Box

Ground Floor (inside entrance right of revolving doors)

South African Reserve Bank Building

60 St Georges Mall

Cape Town, CBD

Compliance information:

Gysbert Verwey

SCM Manager

gysbert@wesgro.co.za



YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF

THE WESTERN CAPE TOURISM, TRADE AND INVESTMENT PROMOTION AGENCY (WESGRO)

Proposals are invited from service providers to supply a submission for a comprehensive global online offering of services relating to cross border foreign direct investment flows and data that covers all sectors and countries worldwide.

Attached please find the terms of reference (RFP) for this tender.

Submissions must reach this office not later than 12:00 on the closing date of the tender.

No late bids will be accepted.

CHECKLIST OF COMPULSORY RETURNABLE SCHEDULES AND COMPLIANCE DOCUMENTS:

Please adhere to the following instructions:

- Tick the relevant blocks below, the documents and schedules that form part of your response.
- Ensure that the following documents, which can be found on <http://www.westerncape.gov.za/eng/pubs/forms/P/247691> is completed and signed where applicable; and
- Use the prescribed sequence in attaching the annexures so that bidders may not be disqualified based on non-compliance / non-responsiveness.

YES NO

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 1 - Invitation of bid; |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 2 – Tax Clearance Certificate Requirements; |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 3.1 - Pricing schedule – firm prices; |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 3.3 - Pricing schedule; |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 4 - Declaration of interest form; (Not applicable to foreign suppliers) |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 6.1 - Preference points claim form in terms of the preferential procurement regulations 2017 and codes of good practice (Not applicable to foreign suppliers); |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 6.2 - Declaration certificate for local production and content for designated sectors (Not applicable to foreign suppliers); |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 6.3 - Preference points claim form in terms of the preferential procurement regulations 2001 – promotion of small businesses (Not applicable to foreign suppliers); |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 7.1 - Contract form – purchase of goods/works/services; |
| <input type="checkbox"/> | <input type="checkbox"/> | WCBD 7.2 - Contract form – sale of goods/works; |
| <input type="checkbox"/> | <input type="checkbox"/> | SBD 8 - Declaration of bidders past supply chain management practices |
| <input type="checkbox"/> | <input type="checkbox"/> | SBD 9 - Certificate of independent bid determination |
| <input type="checkbox"/> | <input type="checkbox"/> | SBD 1 - Invitation to bid (Only applicable to foreign suppliers) |
| <input type="checkbox"/> | <input type="checkbox"/> | SBD 4 – Declaration of interest (Only applicable to foreign suppliers) |

All bids must be accompanied by the following documents sectors **(Not applicable to foreign suppliers):**

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Valid BEE certificate and status including: <ul style="list-style-type: none"> ○ Percentage share of black ownership; ○ Percentage share women ownership; ○ Percentage share disabled; and |
|--------------------------|--------------------------|---|



- Percentage of staff that are disabled.
- Valid Tax pin number sectors (**Not applicable to foreign suppliers**);
- Bank confirmation letter not older than 3 months
- Proof of registration on the Central Supplier Database (CSD) sectors (**Not applicable to foreign suppliers**);
- Proof of registration on the Western Cape Supplier Evidence Bank (WCSEB) sectors (**Not Compulsory nor applicable to foreign suppliers**);
- Proof of registration on CIPC sectors (**Not Compulsory nor applicable to foreign suppliers**);

TENDER REQUIREMENTS

1. All Tender conditions must be strictly adhered to, failing which, this tender submission may be declared non-responsive.
2. It is important that bidders must ensure that when they submit their bid proposals the following requirements are adhered to:
 - (a) Bidders must submit their proposals in closed envelopes ensuring that the tender name and number, bidder's details- name and contact details of the contactable person, business address and e-mail address clearly indicated on the proposal (Envelope) submitted;
 - (b) Complete all the forms; and
 - (c) Includes all the required other and/or desirable documents in support of their bids/proposals
3. Any portion of the document not completed may be interpreted as "not applicable" where appropriate.
4. Tenders must be deposited in tender box before the closing time set out above. No tenders forwarded by facsimile or email, or any mode will be considered.

The tender box situated on: Ground Floor (inside entrance right of revolving doors)
 South African Reserve Bank Building
 60 St George's Mall
 Cape Town, CBD
5. Couriers tenders are permitted but must reach Wesgro before the closing time with prior arrangements made with the courier and informing the Wesgro reception accordingly. Please note that the courier company must deposit the tender proposal in the said tender box. No assistance allowed.
6. Wesgro reserves the right to accept the whole tender or part of a tender or any item or part of any item or accept more than one tender (in the event of a number of items being offered)
7. Wesgro further reserves the right not to accept the lowest or any tender
8. Wesgro will not consider tenders received after the closing date and time for such a tender
9. Wesgro will not be held responsible for any expenses incurred by bidders in preparing and submitting tenders
10. Wesgro may, after the closing date, request additional information or clarification of bidders.
11. A bidder may request in writing and, after the closing date, that his/her tender be withdrawn and which withdrawal will be permitted or refused at the sole discretion of Wesgro after consideration of the reasons for the withdrawal, which shall be set out by the bidder in the written request for withdrawal.
12. Joint Ventures / Consortiums: In the case of a joint venture/consortium, a copy of the Joint Venture agreement must be submitted with the tender documentation.
13. Validity period: Any tender submitted shall remain valid, irrevocable and open for a written acceptance by Wesgro for a period of ninety (90) days from the closing date unless otherwise specified.
14. Compliance: Bidders may also be registered with the Western Cape Supplier Evidence Bank (WCSEB) and must be registered on the National Treasury's Central Supplier Database (CSD). Proof of the status and the CSD report must be included in the proposal as part of the compliance.



15. If bidders are not registered on the CSD, they must follow the following link <https://secure.csd.gov.za/Account/Register> in order to register
16. Notification: Information on all proposals received will be published on the Wesgro website when the tender has been concluded.
17. It is the responsibility of the bidder to ensure that their tax matters with SARS are in order.
18. Each party in the Joint Venture /consortium/partnership must comply with all of the above;
 - B-BBEE: Each bidder must submit a certificate by an accredited B-BBEE verification agency or an affidavit, indicating its B-BBEE rating of the relevant B-BBEE scorecard
 - For Joint Venture /consortium/sub-contracting arrangements, the bidder must also submit a combined B-BBEE certificate issued by an accredited B-BBEE verification agency
19. Wesgro reserves the right to conduct a due diligence investigation prior to the final award of the contract or at any time during the contract
20. Inducements, rewards, gifts and other abuses of the supply chain management system is prohibited.
21. No person who is a provider or prospective provider of goods and services or a recipient or prospective recipient of goods disposed or to be disposed of, may directly or indirectly, through a representative or intermediary promise, offer or grant:
 - Any inducement or reward to Wesgro for or in connection with the award of a contract; or
 - Any award, gift, favour or hospitality to any other role player involved in the implementation of the supply chain management policy;
22. No person who is a provider or prospective provider of goods and services or a recipient or prospective recipient of goods disposed or to be disposed of may directly or indirectly Influence or interfere with the work of any Wesgro official(s) involved in the tender process in order to inter alia:
 - Influence the process and/or outcome of a bid;
 - Incite breach of confidentiality and/or the offering of bribes;
 - Cause over and/or under invoicing;
 - Influence the choice of procurement method or technical standards; and
 - Influence any Wesgro official in any way which may secure an unfair advantage during or at any stage of the procurement process
23. Abuse of the Wesgro Supply Chain Management System is not permitted and may result in the tender being rejected, the cancellation of the contract the blacklisting of the bidder by Wesgro against participation in any future bid processing and any other remedy permitted by law.
24. Declaration and authorisation: Bidders are requested to complete all declarations and authorisations in the schedules attached hereto, failing which the tender proposal may be disqualified.
Evaluation Criteria requirements:
25. Invalid tenders: Tender may be endorsed and may be recorded as potentially invalid in the tender opening record by Wesgro's responsible official in the following instances:
 - If the tender is not sealed;
 - If the tender is not completed in non-erasable ink.
 - Non-responsive Tenders: Valid tender will be declared non-responsive and eliminated from further evaluation if:
 - The bidder has been listed in the Register for Tender Defaulters in terms of Section 29 of the Prevention and Combating of Corrupt Activities Act, 12 of 2004 or has or has been listed on National Treasury's database as a person prohibited from doing business with the public sector;
 - The bidder has failed to complete and/or sign the required declarations and/or authorizations.
26. Disqualified tenders: The tender will be disqualified and eliminated from further evaluation if it fails to adhere to a written request (within the specified period set out in such a request) to:



- Comply with one or more provisions contained in the instruction to bidders;
 - Comply with any other conditions of the tender documentation after being called upon to do so
27. No tender prices will be read-out at the closing time.
28. **Notes:**
- 28.1 Tenders submitted must make use of the official attached tender documents/forms and no documents shall be retyped. Photocopies of the documents/forms may however be used. A tender that is submitted in any other manner might invalidate the tender. Tender documents shall be submitted in a sealed envelope with the name and address of the tenderer, the tender number and the closing date indicated on the envelope.
- 28.2 **NB: ALL TENDER PRICES TO BE INCLUSIVE OF VAT (where applicable).**
- 28.3 Proposers must ensure that the tender name and number, their details - name and contact details of the contactable person, business address and e-mail address - clearly indicated on the proposal submitted.
29. Please insert in envelope one an electronic version (memory stick) of the functionality as evaluation will be completed by staff from their home office and the material needs to be distributed to them electronically on the day.

Gysbert Verwey
Supply Chain Manager
Date 27 July 2022

Kholeka Zama
Chief Financial Officer
Date: 28/07/2022



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1. INTRODUCTION

1.1 INTRODUCTION TO WESGRO AND WESGRO'S RESEARCH UNIT

Wesgro's Research Unit is a division of Wesgro, the official tourism, trade and investment promotion agency for Cape Town and the Western Cape in South Africa. Wesgro is a legislated Schedule 3C Public Entity, as provided for in the Western Cape Investment and Trade Promotion Agency Amendment Act, 2013. The Agency is responsible for tourism, trade and investment promotion. The Agency is governed by a Board of Directors appointed by the Executive Authority in terms of section 3 of the Act.

The Research Unit is the custodian of intelligence related to the Agency's core business. The Unit provides relevant, evidence-based and strategic information to the Agency. It also provides a supportive programme to ensure that market and sector knowledge is presented to potential exporters and prospective investors and that tourism research is provided on the Western Cape's tourism sector. Customised research is central to the offering that the Research team provides, from a foreign direct investment perspective in particular given the Agency's mandate to promote investment, along with trade and tourism.

1.2 PURPOSE OF THE TENDER

The purpose of this tender is to source a service provider to supply a comprehensive global **online offering of services relating to cross border foreign direct investment flows and data that covers all sectors and countries worldwide** for a period of up to three (3) years.

A suitable data subscription is needed to assist the Research Unit in understanding historic and current foreign direct investment flow trends and developments, as well as investment signals not only for Cape Town and all of the Western Cape, but for South Africa and the rest of the world. This foreign direct investment data set will be granular and very detailed, will cover all sectors and countries globally, and will provide various investment insights for the past, current and future.

2. DATA PACKAGE SOLUTION REQUIREMENTS

2.1 MINIMUM REQUIREMENTS

General requirements:

1. User-friendly interface (provide visual evidence of user interface)
2. Accessible in an online browser environment, application and/or dashboard
3. Flat file export capabilities for use in MS Excel
4. Global data for all world-regions
5. Fifteen-year historical data time-series with at least monthly granularity
6. Present-year data on a month-by-month basis, allowing for an appropriate lag period of no more than two months
7. Foreign direct investment data segmentation including company (parent & investing) level; foreign direct investment inflows & outflows; yearly & monthly statistics options; currency denomination; sector, sub-sector, industry and business activity level; source market & destination market level; city, state/county, country, regional and global level
8. Measurable metrics need to include number of investment projects announced, value of capital investment, and number of jobs created



9. Ability to measure and compare a region's relative competitiveness on selected metrics
10. Provide insights into future potential investment project leads and opportunities.

Specific data requirements (as related to the general requirements listed in criteria 7-10):

11. Ability to customise reports and search parameters including by time period, source market, destination market, sector, currency, project type, company, capex, jobs
12. Measurable metrics need to include number of investment projects, value of capital investment, and number of jobs created
13. Provide insights at investing company level including company profile, domicile, activities, revenues, foreign direct investment signals & key contact details
14. Provide trend analysis and graphics
15. Distinction of foreign direct investment inflows versus foreign direct investment outflows for select metric i.e., Company, county, state, country, region
16. Distinction of foreign direct investment flows into sector versus sub-sector versus business activities
17. Distinction of foreign direct investment flows by source market versus destination market
18. Ability to benchmark a city/country/regions competitiveness against other locations.

End-users:

19. Multiple online-user login capabilities (allowing at least two-concurrent users)
20. Direct access to complete solution / data package for Wesgro
21. Value-added service provision of analyses or reports to stakeholders and clients that form part of the wider Wesgro community or general public.

Additional requirements:

22. Maintenance & Ongoing Support: List maintenance periods and scheduling of updates, additional services provided, and continued/on-going technical support extent
23. Supporting documentation: User and training manuals must be provided

2.2 DELIVERABLES

The service provider will be responsible for the delivery of the criteria and items listed in Section 2.1.

2.3 CONTRACT TERM

The provision of the data package solution should extend for up to three-years from the activation date. Payment will be scheduled annually.

3. SUBMISSION REQUIREMENTS AND CRITERIA

Bids that do not comply with the below submission requirements will be deemed ineligible for evaluation and will not be considered.

3.1.1 Bidders will be evaluated in accordance with the below criteria:



CRITERIA	DETAILS	WEIGHTING
1. Company profile	a. Company background b. Related company and business experience c. Length of operations, at least 15 years in field d. Previous or current clients, list two client references	20
2. Quality of the solution	a. Meet the general requirements as listed in 2.1, criteria 1-10 b. Availability of specific data as per 2.1, criteria 11-18 c. Minimum two-concurrent users allowed at any time d. Specify any limit on sharing of data as per criteria 19-21	60
3. Capacity to deliver the solution	a. A dedicated customer relationship manager b. After sales technical support for ad-hoc data queries c. Provision of user and training manuals for all products d. Monthly maintenance schedule of data platform	20
TOTAL POINTS		100
Minimum number of points to be met, based on functionality criteria		80

- 3.2 Submissions will be as prescribed in two envelopes whereby envelope one, indicating the number on the front, will be functionality criteria only. The functionality criteria also need to be submitted electronically on a memory stick included in this envelope. Please ensure that the final hard copy correspond with the electronic copy.
- 3.3 Envelope two will house only the compliance documents and the budget proposal. The submission must include the budget and the costing for the total three-year period broken down for each year, from year 1 to 3 in South African Rand value.
- 3.4 Costing should include all offered services and subscriptions provided and inclusive of South African Value Added Tax (VAT) in the final quote. Costing can be broken down as per the criteria listed in 2.1 or per subscription package that meets the requirements set out in 2.1, at the discretion of the bidder.

4. PROCUREMENT STRUCTURE

- 4.1 The **two-envelope system** will be followed whereby functionality and price will be collectively considered.
- 4.2 Functionality scoring will be out of **100 points** whereby a threshold of **80 points** will qualify for the price adjudication.
- 4.3 The tender evaluation and adjudication will take place in various stages:
Stage 1: Evaluation of all submissions received and the shortlisting of those proposals that scores equal or higher than the minimum threshold of 80 points on the functionality scoring.

Stage 2: Calculation of points for price only for bidders that achieve the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 preference point system, as contemplated in the Preferential Procurement Policy Framework Act 5 of 2000 and the Preferential Procurement Regulations, 2017. Calculation of points for B-BBEE status level of contributor Points will 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	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
None-compliant contributor	0

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

Where

P_s = Points scored for comparative price of bid under consideration

P_t = Comparative price of bid under consideration

P_{\min} = Comparative price of lowest acceptable bid

Bids will not be disqualified from the bidding process if the bidder did not submit a certificate substantiating the B-BBEE status level of contribution or is a non-compliant contributor. Such a bidder will score zero (0) out of a maximum of 20 points respectively for B-BBEE.

Stage 3 – A Bid report to be submitted to the Bid Adjudication Committee for approval of the process and ensuring that the process followed were in line with the Tender Policy and after all compliance tests have been completed. The report, if approved will be submitted to the Wesgro CFO, CEO and where applicable to the Chair of the Wesgro Board. The winning bidder will be informed in writing on the outcome and after accepting the Wesgro offer arrangements will be made on the way forward. The other suppliers that submitted a proposal on this tender will be informed accordingly. Please be informed that the process followed might take longer than usual due to the lock down protocol currently in place.

6. FINANCIAL ARRANGEMENT

Bidders are solely responsible for their own costs in preparing the Proposal.

7. OWNERSHIP OF PROPOSALS

All data and documentation developed and collected for the purposes of this proposal will be the property of the Western Cape Tourism, Trade & Investment Promotion Agency (WESGRO).



8. WESGRO'S RESPONSIBILITIES & DISCLAIMER

Wesgro will share with the service provider information that it has relevant to the project. It is advisable that the service provider consider Wesgro's stock of information when preparing the cost quotation on this project. Please be advised Wesgro cannot make any representations or guarantees as to the accuracy of the information supplied and furthermore will not be held liable for any incorrect or misleading information in relation to any part of this document and reference documents hereto. It remains the responsibility of the service provider to collect and process the information required for this project and the service provider must make and rely on their own investigations and satisfy themselves in relation to all aspects of this project.

9. CONTRACTUAL OBLIGATIONS

This tender document will be appended to Wesgro's Contract with the service provider and will constitute the schedule of deliverables for the purposes of this project. The service provider's quotation must remain valid for a period of **90 days** from the date of submission and be **inclusive of VAT**. All prices indicated in the quotation must remain fixed for the period of the project. The service provider's quotation must also provide sufficient detail in terms of various cost as set out in this request. It is also to note that all Information on all proposals received for this tender will be published on the Wesgro website when the tender has been concluded.

10. ABSENCE OF OBLIGATION & CONFIDENTIALITY

No legal or other obligation shall arise between the service provider and Wesgro unless and until a formal contract has been signed by both parties. Proposals submitted will not be revealed to any other bidders and will be treated as contractually binding. Wesgro reserves the right to seek clarification or verification of any information in the Proposals. **The successful bidder will be expected to sign a Non-Disclosure Agreement before a Contract is awarded.**

11. CONFLICT OF INTEREST

The Bidder may not in any way that is inconsistent with his/her duties; expose him/herself to any situation involving the risk of a conflict of interest between the official responsibilities required of the outsourced bid and with that of private interests.

12. ENQUIRIES AND RESPONSES

All enquiries on this tender must be directed to the xx in writing to the below e-mail address:

Janine Botha

Designation: Head of Research

Mobile: +27(0) 82 351 9306

E-mail address: janine@wesgro.co.za

Physical address: 18th floor, Reserve Bank, 60 St George's Mall, Cape Town, 8001

Postal address: P.O. Box 1678, Cape Town, 8000.

SCM and Tender compliance requests may be directed in writing to the Supply Chain Manager to the below e-mail address:



Gysbert Verwey

Designation: Supply Chain Manager

E-mail address: gysbert@wesgro.co.za

Physical address: 18th floor, Reserve Bank, 60 St George's Mall, Cape Town, 8001

Postal address: P.O. Box 1678, Cape Town, 8000

End of RFP