

the dti

THE DEPARTMENT
OF TRADE AND INDUSTRY
SOUTH AFRICA



BUSINESS PROCESS OUTSOURCING AND OFF-SHORING (BPO&O) INCENTIVE PROGRAMME

APPLICATION FORM

APPLICANT / PROJECT NAME: _____

FOR INFORMATION

- Please study the BPO&O incentive programme guidelines before completing the application form.
- All sections of this form must be completed by an authorised official of the applying project.
- Ensure that all the required information indicated in Section 8 are enclosed.
- **Submit a completed form by registered mail, courier or hand deliver to:**

Postal address:
The Enterprise Organisation
Private Bag X86 Pretoria
0001

Website: www.thedti.gov.za
Call Centre: 0861 843 384

Physical Address:
The DTI Campus
77 Meintjies street
Sunnyside
Pretoria
0002

Section 1

APPLICANT INFORMATION

1. Registered name of applying company in full: _____

2. Postal address: _____

3. Physical address (of the applying company where serving of legal documents and other notices):

 _____ Province: _____

4. Incorporation number and date (i.e. Republic of South Africa Company Number):
 Number: _____ Date: _____

5. Income tax number: _____

6. Tax Office: _____

7. Contact person of the applying entity:
Name: _____
Designation: _____
Tel (____) _____ **Fax (____)** _____
Mobile _____ **Email address** _____

8. Financial Year end: _____

9. This section is only applicable where the applying project is using an agent/consultant to assist with this application:

Name Authorised Agent (Consultant) (If Applicable): _____
 Contact person: _____
 Postal address: _____
 Postal Code: _____
 Tel: (____) _____ Fax:(____) _____
 Mobile: _____ Email address: _____

10. Details of Shareholding/Members/ Sole Proprietor/Joint Ventures and Group Structure		
Name	% Shareholding	Nationality

Section 2**DETAILS ABOUT THE BUSINESS OPERATIONS AND THE APPLYING PROJECT****11. Details of applying project**

Registered name of the project	
Physical address of the project	
Commence date of the project	

12. The applying project is (Mark where applicable)

Project description	X	Short narration, where necessary
A start-up of a new BPO operation		
An expansion of an existing South African (SA) operation		
A new project in SA to expand an existing global operation		
Other, specify:		

13. The applying project can be described as (Mark where applicable)

Project description	X	Short narration, where necessary
A cost center of an existing operation (a captive)		
A branch of an existing BPO operation		
A joint venture between entities		
Other, specify:		

14. Describe the services/activities (to be) provided by the applying project

Broad category	X	Short description of activities/services
IT and Technical Services		
Contact Centre functions		
Finance and Accounting services		
Human Resources functions		
Data entry, conversion & maintenance		
Insurance industry functions		
Website design and development		
Other, specify		

15. Describe the revenue streams, indicating the % share of revenue to be generated from either South African markets and/or offshoring activities

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16. Provide details of expected contracts with major clients:

Name of client	Value of contract	Duration of service contract

17. Employment opportunities to be created by the project					
		Current number of full-time employees	Number of new employment opportunities to be created by...		
			end of 1 st year	end of 2 nd year	end of 3 rd year
Agents {only}	Permanent				
	Temporary/ casual staff				
Total number of agents					
Other staff (incl. support staff and management)					
Total staff complement					

18. Provide planned salaries figures				
Description	Base Year	Year 1	Year 2	Year 3

Salaries				
Other Salaries				
Total salaries as per income statement				

19. Indicate how will the project be financed? State the source and amount:	
Source	Amount

20. Provide details of any financial assistance/benefits received from programmes/schemes funded by Government, e.g.: SMEDP, NIP, etc.		
Scheme	Amount	From - to
Moneyetla Developmental Support Infrastructure Grant		
Telecom Developmental Support		
Others:		

Section 3	DETAILS ABOUT COMPANY INTERNAL PROJECT EVALUATION
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- (21) What internal project evaluation benchmarks were used to assess the financial viability of this project? Please provide details on the outcomes of that evaluation. {E.g. project Internal Rate of Return, break-even analysis, financial ratios, cost-benefit analysis, cost structure analysis, etc.}

- (22) Is the company considering other alternative projects? If yes, how does this project compare to alternative project(s) that are being considered?

- (23) Is the company considering other locations for this project? If yes, how does locating the project in SA compare with locating elsewhere?

- (24) Project significance: What is this project's potential % contribution to overall annual company revenue?

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Section 4	DETAILS ABOUT THE TRAINING EXPENDITURE OF THE APPLYING ENTITY
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25. Provide details of planned training programme for the next 3 years

Description or Name of Course/Training	Internal or External provider?	Name of provider	Number of Agents to be trained	Duration of training/course	Cost R

Section 5	INVESTMENT AND BUSINESS EXPANSION PLAN
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26. Provide details of planned investment expenditure on the applying project for the next 3 years.

Description	Base Year (Expansions only) R	Additions Year 1 R	Additions Year 2 R	Additions Year 3 R	Total Additions R	Declaration: Is a supplier a 'connected party' to the applicant (Yes or No)
• New construction						
• Renovations/installations and upgrades						
Equipment Hardware Costs:						
• New purchases						
• Used purchase						
• Upgrade existing						
Software Costs:						
• Own software						
• Vendor supplied						
Telecom Installation Costs:						
Total						

27. Provide details of business expansion/ expected ramp-up for the next 3 years:

Capacity expansion:	Current capacity	Projected capacity for ...		
		Year 1	Year 2	Year 3
Number of seats				
Floor space required for BPO activities only (in sq meters)				
Total floor space required for the whole operation (sq meters)				

Section 6	SUMMARY OF QUALIFYING INVESTMENT COSTS
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30. Indicate the projected cost of qualifying items:				
	Base Year R	First Year R	Second Year R	Third Year R
	As at: _____	As At: _____	As At: _____	As At: _____
EQUIPMENT HARDWARE COSTS:				
-Sever(s)				
-Computer for Workstation				
-Workstation furniture				
-Firewall cost				
-Related labour costs				
-Equipment Maintenance				
-Equipment upgrades				
-Other, specify				
SOFTWARE COSTS:				
-Software Programmes				
-Software licences				
-Software maintenance				
-Other, specify				
TELECOMS INSTALLATION COSTS:				
-Line installation				
-Fax serve costs				
-Routing costs				
-Other, specify				
TOTAL				

Employee Forecast Section 7 B

New Employees											
Job title	Year 1	Year 2	Year 3	Total after 3 years	Standard based training/ NQF level planned	Skills / training level	Existing employment totals	Total number of employees after 3 years	Grand total new and existing employees	Grand total actual	

Year 1		Provide numbers																
Black		Coloured		Indian		White		Disabled		Total	Age							
M	F	M	F	M	F	M	F	M	F		-20	21-29	30-39	40-49	50-59	60+	Total	
										0								0
Projected year 2																		
Black		Coloured		Indian		White		Disabled		Total	Age							
M	F	M	F	M	F	M	F	M	F		-20	21-29	30-39	40-49	50-59	60+	Total	
										0								0
Projected year 3																		
Black		Coloured		Indian		White		Disabled		Total	Age							
M	F	M	F	M	F	M	F	M	F		-20	21-29	30-39	40-49	50-59	60+	Total	
										0								0

PROJECTED WAGE BILL FOR THE 3 YEARS

Summary

Black		Coloured		Indian		White		Disabled		Total	Age profile					
M	F	M	F	M	F	M	F	M	F		-20	21-29	30-39	40-49	50-59	60+
0	0	0	0	0	0	0	0	0	0	0	0	35	2	0	0	0
0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Skills Needs Section 7 C

Job title breakdown:(for which there is a training need)					
Number of learners to be trained on this job					
Purpose of the training:				Record including date of completed training	
Outcomes (as company statements) and tasks	On-the-job training duration	Off-the-job net training duration	Trainer (in-house / outsourced)	Trainee (signed)	Trainer / Assessor (signed)
Outcome 1					
Task					
Task					
Task					
Outcome 2					
Task					
Task					
Task					
Outcome 3					
Task					
Task					
Task					
Outcome 4					
Task					
Task					
Task					
Task					
Normally the number of outcomes are between 4 and 7 per course					
If unit standards are available, attach copies instead of the above					
Equipment needed for the training					
Consumables needed for the training					

Learning Prog Dev. Section 7 G

Year 1					
National learning standards	Duration (weeks)	NQF based	Credits if NQF based	Name: Course Developer	Cost
				Subtotal	R
Development of Skills Development Facilitators				Provider	
				Subtotal	R
Training of facilitators				Provider	
Testing and selection of staff				Provider	R
				Subtotal	R
Learning programme development	Duration (weeks)	NQF based	Credits if NQF based	Name: Course Developer	
				Subtotal	R
Assessor training				Provider	
				Subtotal	R
Printing costs				Printing company	
				Subtotal	R
				Total	R
Projected year 2					
National learning standards	Duration (weeks)	NQF based	Credits if NQF based	Name: Course Developer	Cost
				Subtotal	R
Development of Skills Development Facilitators				Provider	
				Subtotal	R
Training of facilitators				Provider	
Testing and selection of new staff					R
				Subtotal	R
Learning programme development	Duration (weeks)	NQF Based	Credits if NQF based	Name: Course Developer	
				Subtotal	R
Assessor training				Provider	
				Subtotal	R
Printing costs				Printing Company	
				Subtotal	R
				Total	R
Projected year 3					
National learning standards	Duration (weeks)	NQF based	Credits if NQF based	Name: Course Developer	Cost
				Subtotal	R
Development of Skills Development Facilitators				Provider	
				Subtotal	R
Training of facilitators				Provider	
Testing and selection of new staff					R
				Subtotal	R
Learning programme development	Duration (weeks)	NQF based	Credits if NQF based	Name: Course Developer	
				Subtotal	R
Assessor training				Provider	
				Subtotal	R
Printing costs				Printing company	
				Subtotal	R
				Total	R
				Grand total	R

The dti BPO&O Programme
Capital Grant Section 7 H

Equipment	Year 1	Year 2	Year 3	Description of physical equipment	Serial number	Number of units	Unit price	Total Requested
New 'off-the-line' Physical Training Capacity Equipment installed in-house								
New 'off-the-line' Physical Training Capacity Equipment installed in outsourced provider								
O/H Projector								
Screen								
Whiteboard								
Flipchart								
TV Monitor								
VCR								
Video cam								

Section 8**FINANCIAL PLAN**

28. PROJECTED INCOME STATEMENT (R'000)				
	BASE YEAR	YEAR 1	YEAR 2	YEAR 3
Indicate the relevant financial period				
Gross Revenue				
BPO & O				
Other				
Less: Cost of Sales				
Plus: Other Income				
Gross Profit / (Loss)				
Less: Expenses				
- Rental of premises				
- Training Expenditure				
- Other expenses				
Less: Interest Paid				
Profit / (Loss) after Interest before Tax				
SA Normal Tax				
Profit / (Loss) after Tax before Extraordinary items				
Plus / (Minus) Extraordinary Items				
Nett Profit / (Loss)				
Less: Dividends				
Plus: Retained profit / (Loss) at the beginning of the year				
Retained Profit / (Loss) at the end of the year				

29. PROJECTED BALANCE SHEET (R'000)				
	BASE YEAR	YEAR 1	YEAR 2	YEAR 3
Indicate the relevant financial period				
TOTAL EQUITY/MEMBERS INTEREST				
Share Capital / Members Interest				
Share Premium				
Shareholders Loans				
Reserves: Distributable				
Reserves: Non-Distributable				
Accumulated Profit / (loss)				
Deferred Taxation				
LONG TERM LOANS				
CURRENT LIABILITIES				
TOTAL CAPITAL EMPLOYED				
FIXED ASSETS				
- Land (at Cost)				
- Buildings (at cost + additions)				
- Capitalised Equipment Hardware costs				
- Capitalised Software Costs				
- Telecoms Installation Costs				
- Other				
Less: Accumulated Depreciation				
INVESTMENTS				
INTANGIBLE ASSETS				
- Goodwill				
- Patents				
- Trademarks				
OTHER				
- Specify				
- Specify				
CURRENT ASSETS				
TOTAL ASSETS				

Section 9 DOCUMENTS TO BE ATTACHED TO THIS FORM

	<i>Tick</i>
1. Business Plan (which includes details on the internal evaluation of the project)	
2. Valid Incorporation certificate	
3. Projected financial statements	

Section 10 DECLARATION

I herewith declare that the information in this application is a fair and true reflection of the intended project and that all relevant information has been disclosed. I am aware of the fact that the information submitted with this form will have a material bearing on the adjudication of the application and if it, therefore, subsequently transpires that any information herein and in addenda was not correct, or that certain information was omitted, the dti shall be entitled to withdraw or amend its approval and without prejudice to its rights, recover any amounts already paid or to withhold any future payments due.

This application (with any addenda), if successful, will form part of the contract with the DTI.

NOTE: If the application is compiled by an independent consultant, the applicant must ensure that the information provided is correct before signing the application. If at a later stage it transpires that information is not correct, the applicant will be held solely responsible for misrepresentation and legal action may be instituted.

.....
SIGNED

.....
CAPACITY

(Authorised signature of authorised official **in the employ** of the entity in terms of Board Members Resolution attached hereby)

.....
NAME IN PRINT

.....
DATE

Section 11 RESOLUTION OF THE BOARD OF DIRECTORS / MEMBERS / OWNER (S)

The Board of Directors/Members/Owner(s) of
(name of entity/project) hereby authorises
(name of individual), in his capacity as
to sign all documents pertaining to this application to the Adjudication Committee or any other documentation
pertaining hereto.

Signed at on this day of

SIGNATURE(S)

NAME(S)

Section 12 APPOINTMENT TO ACT AS A CONSULTANT (WHEN APPLICABLE)

The Board of Directors/Member(s)/Owner(s) of
(name of entity/project), declare that

(name of consultancy firm), was appointed as consultant to act on our behalf with regard to issues pertaining
our participation in the BPO&O Incentive Programme. This appointment will remain in force until formal notification
of change by the above entity.

NB: This appointment **does not** authorise the consultant to sign any BPO&O documents on behalf of the
applicant. All documents submitted to the Adjudication Committee must be signed by the **applicant**, duly
authorised by his Board of Directors / Members / Owner (s).

Signed at on this day of

SIGNATURE(S)

NAME(S)

