



ASISA

ENTERPRISE AND

SUPPLIER DEVELOPMENT



# OUR DRIVING FORCE

## Creating impact

The Association for Savings and Investment South Africa (ASISA) represents most of South Africa's asset managers, collective investment scheme (CIS) management companies, linked investment service providers, multi-managers, and life insurance companies. Transformation is at the top of ASISA's strategic priorities. This is reflected in the [ASISA Mission Statement](#), which places urgency on the following actions:

- Building a transformed, vibrant, and globally competitive financial sector.
- Actively participating in education, transformation, and social development.

ASISA has therefore established three independent initiatives under the Foster the Future banner aimed at fast-tracking transformation: the ASISA Academy, the ASISA Foundation and ASISA Enterprise and Supplier Development (ESD).



The ASISA Enterprise and Supplier Development (ESD) initiative was founded by ASISA in 2013 to facilitate the sustainable development of high-potential black owned small and medium enterprises (SMEs) through an innovative combination of tailored business support, access to market and financial support when required. Qualifying SMEs are selected from the supply chains of ASISA member companies.

The ASISA ESD initiative, powered by Edge Growth, consists of the following structures:

- The ASISA Enterprise Development Trust and the ASISA Supplier Development Trust, which are investment vehicles referred to as the ASISA ESD Funds.
- The ASISA Enterprise and Supplier Development Management Company, which delivers SME development programmes.

The operational model of the ASISA ESD initiative has been structured to align with the requirements of the Financial Sector Code (FSC), by strategically optimising ESD spend in terms of the B-BBEE scorecard while achieving meaningful and measurable commercial and social impact outcomes. This ESD initiative aims to support SME's that can plug into our funders value chains, achieve growth and create jobs.

Funders contribute to the ESD initiative by providing investment, loan and grant capital to the Funds and/or project capital to the Manco. This funding is then channelled into SME development investments and/or SME development programmes and contributes to the financial services industry transformation process.

# OUR IMPACT IN NUMBERS



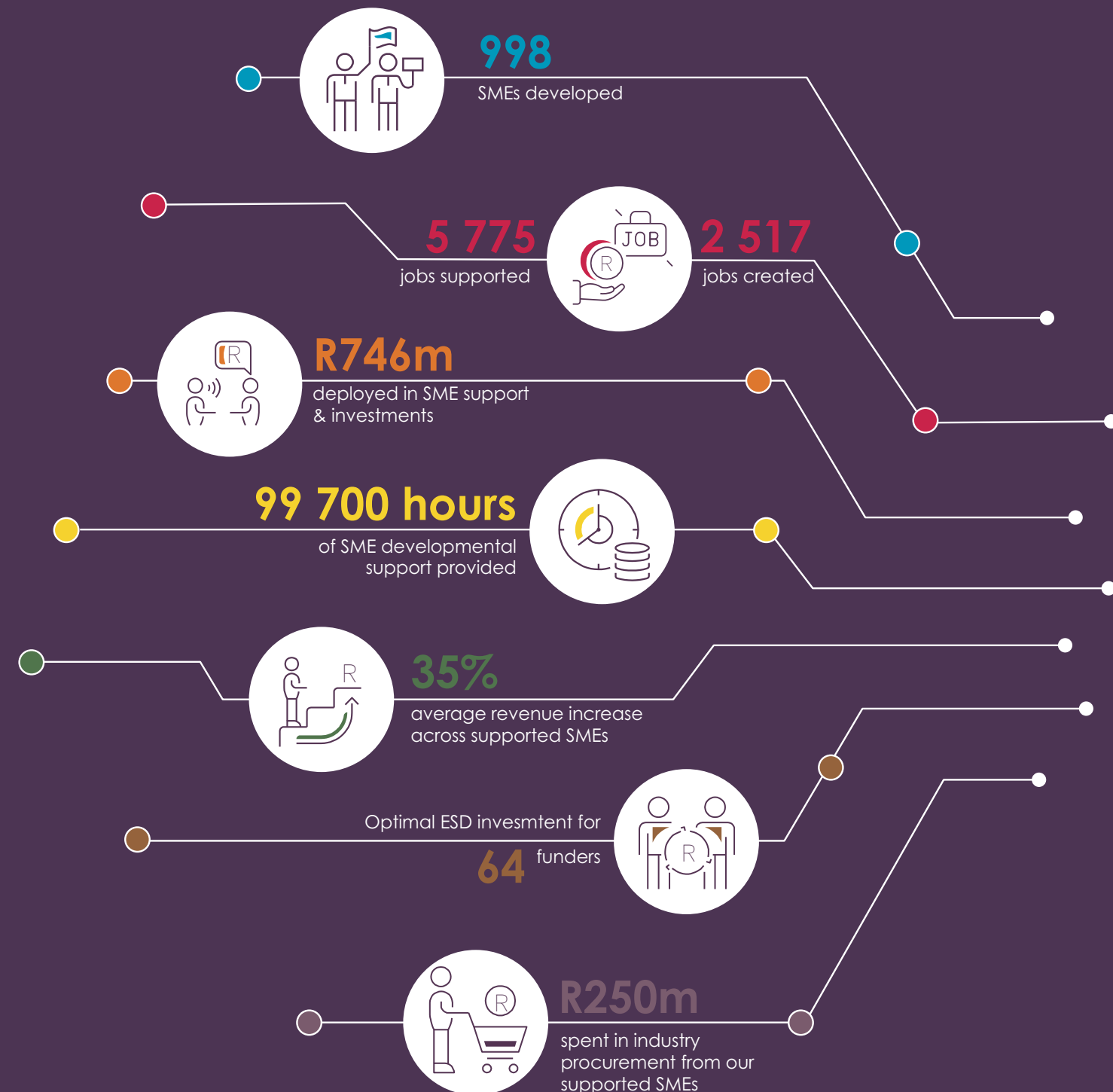
*It is a core goal of the ASISA ESD initiative to create significant impact within the ASISA member ecosystem, as well as the financial services sector more broadly, by supporting emerging black-owned businesses in the space.*

*This includes, but is not limited to, significant job creation, support of emerging players such as black brokers and asset managers as well as suppliers to the insurance industry, and emerging healthcare solutions.*



The below illustrates some of the outcomes achieved by the ASISA ESD initiative since inception

(Jan'2013 – Feb'22)



Our Quarterly Impact statistics can be found [here](#).

# THE ESD FUNDS

Our SME investments

Our Funds invest in majority black-owned SMEs with high growth potential, supply chain alignment, differentiated competitive advantage and the strategic business fundamentals required to succeed. They invest in equity, debt, or combined structured deals of between R1 million and R50 million to support businesses requiring expansion capital to grow and create jobs and social impact.

Our current investment portfolio includes SMEs from the following sectors: electronic and electrical equipment, the green economy, motor body repair, construction, financial services and tech (including insuretech and healthtech). All transactions are evaluated and approved by the ASISA ESD Investment Committee, which consists of investment professionals with experience in private equity, SMEs and developmental investing.

To view our portfolio companies please visit our [website](#).



***Most of the SMEs included in the ESD investment portfolio deliver solid growth in revenue as well as job numbers as a direct result of the funding received together with post investment support.***

LEON CAMPHER,  
Investment Committee Chair



# THE ESD MANCO

Our SME development programmes

The Manco provides uniquely tailored business acceleration and developmental support that majority black owned SMEs require to grow. Our supplier development programmes enable funders to strategically build enterprises and suppliers that are directly aligned to their value chains.

The current SME development programmes include an independent financial advisor (IFA) programme, the Inseta Broker Development Programme, OUTsurance Kwande ESD Programme, Sanlam Group ESD Programme, a stockbroker programme, the MMH Programme and the Santam Broker Programme. The ASISA ESD programme sponsor approves the overall programme strategy and objectives planned to unlock access to skills, growth and procurement opportunities to programme SMEs.

For further detail on our programmes visit our [website](#).



***The success of the Initiative is tied up with the development pillars focusing on providing access to skills, market & capital. The resulting, sustained impact adds to the industry's transformation journey.***

FRANCOIS ADRIAAN,  
Trustee





# FUNDER BENEFITS



## FUND MANAGER

Experienced fund management and Business Development Support team.



## COST EFFICIENCY

Maximum year on year compliance benefit.



## IMMEDIATE ESD POINTS

Immediate and on-going access to B-BBEE ESD and preferential procurement points.



## SOCIAL IMPACT

Job creation support, aligned to industry & national priorities.



## TURNKEY SOLUTION

Flexible, tailored, turnkey needs driven ESD solution.



## GOVERNANCE

Best practice governance & standards.

# SME BENEFITS



## ONGOING SUPPORT

Business development support for the duration of the investment / programme.



## GROWTH STRATEGY AND PLAN

Tailored growth strategy and implementation plan.



## REPORTING

Best practice business performance reporting.



## SKILLS DEVELOPMENT

Targeted, tailored mentoring & skills development.



## DIAGNOSTIC ASSESSMENT

Upfront diagnosis of business state & growth constraints.



## FINANCIAL SUPPORT

Capex or Opex tailored to their needs.



## ACCESS TO MARKET

Potential access to industry markets and procurement opportunities.

# BOARD OF DIRECTORS

Governing our initiatives and representing industry and Government with more than 200 combined years of specialist experience in financial services, governance, fund management, procurement and transformation.



# INVESTMENT COMMITTEE

Evaluating and approving the Funds' portfolio of investments, boasting investment professionals with experience in private equity, SMEs and developmental investing.



# LET'S TALK

We'd love to show you how we can maximise the value of your ESD contribution.

Once your requirements have been confirmed, we will provide you with an ESD Contribution Agreement tailored to your requirements as well as our B-BBEE Certificate.

We will further assist to:

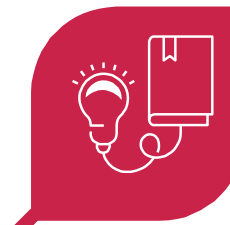
Process and accredit your ESD spend



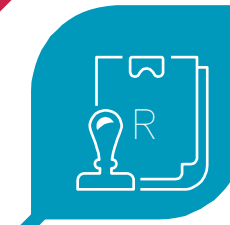
Unlock sustainable SME growth through grant/non-recoverable spend



Determine an optimal funding approach (Grant, Loan, Investment, Programme or Combination)



Develop your ESD Contribution Agreement



View our funders [here](#).

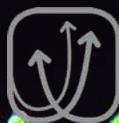
ASISA's Enterprise and Supplier Development initiatives  
 B-BBEE procurement level 2  
 +27 (0) 21 671 2658  
[info@asisaesd.org.za](mailto:info@asisaesd.org.za)  
[www.asisaesd.org.za](http://www.asisaesd.org.za)



*Business is good for  
development and  
development is good  
for business*



*World Business Council for Sustainable Development*



ASISA

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POWERED BY

**EDGE**

G R O W T H

