



Dear SAVCA Member

We are pleased to announce the **SAVCA Case Study Compendium**, a research project designed to showcase the role of the Southern African private equity industry as a significant contributor to sustainable development.

The report, which is due for publication at the SAVCA conference in February 2015, will be a compilation of twenty case studies, each representing a private equity portfolio company. The final report will be disseminated across all SAVCA platforms and, alongside other SAVCA research, will be a powerful marketing and lobbying tool for the industry.

This letter serves as a **request to SAVCA's members to volunteer a portfolio company from a current portfolio for this research**. The company would be one that is close to the exit stage to enable analysis of the value-addition activities of the fund manager.

The research methodology

Elements featured for each case study will include:

- Company name
- Name of private equity investor
- Country (head office)
- Sector
- Investment amount
- Revenue
- Employees
- EBITDA growth
- ESG Impact (sub-bullet points of key investment impacts)
- ESG Interventions (sub-bullet points of key investment interventions)

The research will be conducted by Environmental Business Strategies (EBS) through interaction with the private equity fund manager or direct contact with management of the portfolio company.

All sensitive primary data will be treated confidentially by EBS staff, who are subject to a confidentiality agreement. Sensitive data will not be disclosed to the public or to SAVCA executives or directors.

Commitment and effort required from Fund Managers and Portfolio Company Management

Fund managers are requested to provide:

- The **details of a portfolio company that can be considered for inclusion in the Case Study Compendium**.

- Note that all effort will be made to ensure that the report presents examples across industries, investment stage and asset size. The researchers, together with the SAVCA Research Sub-Committee, retain the right to make a final decision on which portfolio companies to include in the report.
- In order for the Sub-Committee to make an informed selection decision, kindly provide the following details to the SAVCA office **by Wednesday 3 September 2014**:
 - Name of portfolio company
 - Sector
 - Enterprise value
 - Stage and category of investment:
 - Start-up, early stage or venture capital
 - Growth and expansion capital
 - Later stage, buyouts, buy-ins
 - The contact person(s) for the research (at the fund manager and/or at the portfolio company)
- Once selected for inclusion in the Case Study Compendium, the contact person(s) will be required to make themselves available to the researchers for a commitment of **about three hours during September 2014**. This will include an interview process, as well as the time required to submit supporting documents and photos to the researchers.
- Once drafted, the case study will be vetted and **signed off by the fund manager**. This will be during October 2014.

Please contact me should you need any further details on this research.

We look forward to working with our members on this important project.

Kind regards



Erika van der Merwe
CEO: Southern African Venture Capital & Private Equity Association