

## REQUEST FOR QUOTATION (RFQ)

### REQUEST FOR QUOTATION FOR GROUP STRATEGY PLANNING TRAINING FOR TRADE & INVESTMENT KWAZULU-NATAL

RFQ No.	RFQ/202425/11
RFQ ISSUE DATE	06 FEBRUARY 2025
BRIEFING SESSION	N/A
RFQ DESCRIPTION	CAPACITY BUILDING PROGRAM FOR GROUP STRATEGY PLANNING TRAINING FOR TRADE & INVESTMENT KWAZULU-NATAL
CLOSING DATE & TIME	13 FEBRUARY 2025 @ 12h00
LOCATION FOR SUBMISSIONS	<a href="mailto:quotations@tikzn.co.za">quotations@tikzn.co.za</a>

Bidders must submit responses via e-mail at: [quotations@tikzn.co.za](mailto:quotations@tikzn.co.za) before or on the stipulated date and time.  
For any queries or questions, please use the above-mentioned email address.

Trade & Investment KwaZulu-Natal requests your quotation on the goods listed above. Please furnish us with all the information as requested and return your quotation on or before the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

MAAA NUMBER (CSD NO) \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO: \_\_\_\_\_




E MAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_






CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

#### KwaZulu-Natal Office

-  Trade & Investment House, 1 Arundel Close  
Kingsmead Office Park, Durban 4001  
South Africa
-  PO Box 4245, Durban 4000, South Africa
-  + 27 (0) 31 368 9600

#### Gauteng Office

-  Financial Place, 99 George Storrar Avenue  
Groenkloof, Pretoria 0181
-  +27 (0) 12 346 4386/6763
-  +27 (0) 12 346 4774
-  [info@tikzn.co.za](mailto:info@tikzn.co.za)
-  [www.tikzn.co.za](http://www.tikzn.co.za) / [www.exportkzn.co.za](http://www.exportkzn.co.za)

**DIRECTORS:** R N Ngcamu (CEO), T V Mhlongo (CFO), N M Sajini (Acting Company Secretary)



## **DETAILED SPECIFICATION**

### **REQUEST FOR QUOTATION FOR A CAPACITY BUILDING FOR GROUP STRATEGY PLAN TRAINING FOR TRADE & INVESTMENT KWAZULU-NATAL**

#### **1. INTRODUCTION**

- 1.1. Trade & Investment KwaZulu-Natal is a South African trade and inward investment promotion agency, established as a Schedule 3C public entity, to promote the province of KwaZulu-Natal as an investment destination and to facilitate trade by assisting local companies to access international markets. In terms of the Public Finance Management Act, Act No.1 of 1999, as amended (PFMA), Trade & Investment KwaZulu-Natal must fully comply with all the requirements of the PFMA and all other relevant and applicable legislation.
- 1.2. Trade & Investment KwaZulu-Natal is governed by the KwaZulu-Natal Trade and Investment Agency Act, 2010 (Act No. 05 of 2010). In terms of Chapter 2 section 4 (1) of the KwaZulu-Natal Trade and Investment Act, the main functions of the entity are to:
- Identify, develop, market, and promote investment opportunities in the province to international and domestic investors;
  - Develop the export capacity of the province;
  - Develop the export market of the province;
  - Foster trade and investment within the province;
  - Develop a provincial investment and export plan for the development, promotion, and marketing of inward investments and exports from the province; and
  - Keep and maintain a database of investment opportunities within the province in such a manner as to benefit all sectors of the economy.

#### **2. BACKGROUND**

Trade and Investment KwaZulu-Natal (TIKZN) is seeking the services of experienced Consultants to facilitate a capacity-building program in Group Strategy Planning for KZN-based companies. This capacity-building program will enhance the knowledge and skills of participants in key compliance areas, empowering them to achieve and maintain compliance with South African regulations, strengthen their financial and operational management capabilities, and align their practices with sustainability and export-readiness standards.

#### **3. PURPOSE**

The purpose of Group Strategy Planning training is to ensure that the selected KZN-based exporters are in a better position to execute their Strategic Plans necessary to access foreign export markets. The drafting of a strategic plan remains critical to being competitive in the export market. The compilation of a realistic Strategic Plan, containing clear goals, ensures competitiveness in local and international markets. This initiative focuses on equipping businesses with an initial theoretical framework and subsequent practical knowledge to address various compliance, strategic, and operational requirements.

The purpose of a strategic plan is to provide a clear roadmap for a company to achieve its medium-to-long-term goals and objectives. It outlines the vision, mission, and strategic priorities, defining how resources will be allocated, and decisions will be made to drive progress.

Specifically, a strategic plan:

- Sets Direction: Establishes a vision and mission to guide the organization's future actions.
- Align Goals and Actions: Links high-level goals to actionable steps and initiatives.
- Focuses Resources: Prioritizes resource allocation (time, money, and personnel) to critical areas for maximum impact.
- Facilitate Decision-Making: Provides a framework for evaluating new opportunities and making informed choices.
- Measure Progress: Defines key performance indicators (KPIs) and metrics to monitor progress and outcomes.
- Enhance Stakeholder Communication: Clarifies the organization's purpose, direction, and goals to stakeholders, partners, and team members.
- Ensure Adaptability: Helps organizations anticipate change and remain flexible while maintaining strategic focus.

Ultimately, a well-constructed strategic plan ensures a structured approach to achieving success, fostering alignment across teams and stakeholders.

#### 4. METHODOLOGY

4.1 All bidders are required to submit a comprehensive/detailed proposal including the following components:

- Company profile, including history, group structure, operations, logistics, and related companies and services;
- How is your company structured to provide the necessary skills for this Project and why is this beneficial to TIKZN;
- Facilitators should have a proven track record of involvement in similar projects. The proposal should provide a detailed curriculum vitae (CVs) of facilitators.
- The proposal, including brief profiles of team members and their experience and qualifications.
  - Provide written client reference letters on the client's letterhead related to Project management, which your Company provided, accompanied by contact details.
  - A detailed TIKZN-specific proposal showing activities and timeframes.
  - A detailed budget breakdown with full costings of each activity.
- The Service Provider's proposal must also outline the methodology they intend to adopt to meet the objectives and deliverables specified above. This methodology should outline and indicate how all these deliverables will be carried out in the form of a Work Plan.

4.2 Participants/Stakeholders

The following are key stakeholders of the workshop:

- a. KwaZulu Natal Based companies;
- b. The Export & Development Unit at TIKZN
- c. **(5)** locally based **(KZN)** companies will be recruited by TIKZN

## 5. SCOPE OF WORK

**NB: TIKZN WILL BE PROVIDING THE VENUE AND CATERING SERVICES.**

ITEM NO.	SCOPE OF WORK	DELIVERABLES
1.	Strategic Plan	<ul style="list-style-type: none"><li>• Develop and deliver comprehensive training materials for training in the compilation of the Strategic Plan (SEP).</li><li>• Conduct interactive training sessions with real-world examples of case studies.</li><li>• Provide practical tools and templates for the compilation of, initially the draft, then subsequently the final version.</li><li>• Situation Analysis: Conduct an internal and external environmental scan (SWOT, PESTEL).</li><li>• Stakeholder Engagement: Facilitate consultations to gather input from key stakeholders.</li><li>• Strategic Priorities: Define organizational priorities, strategic goals, and outcome indicators.</li><li>• Implementation Plan: Develop an action plan with timelines, responsible parties, and key performance indicators (KPIs).</li><li>• Monitoring and Evaluation: Establish a framework for tracking progress and evaluating results.</li></ul>
2.	Key outputs	<ul style="list-style-type: none"><li>• Inception Report: Outlining the methodology, work plan, and timeline.</li><li>• Situation Analysis Report: Summary of the internal and external analysis findings.</li><li>• Draft Strategic Plan: Including goals, strategies, action plans, and M&amp;E framework.</li><li>• Final Strategic Plan: A refined version incorporating feedback.</li><li>• Executive Summary and Presentation: A concise summary and presentation for stakeholders.</li></ul>

## 6. DURATION

6.1 The program will run over a period of two (2) weeks, with one(1) full-day training session per week scheduled as follows:

- **Session/Week 1:** Understanding the Structure of a Strategic Plan, Key Theories and Approaches to Strategic Plan Development, a Guided Workshop to Develop Individual Strategic Plans.
- **Session/Week 2:** Presentation of the Draft Strategic Plans by Participants, Refining and Finalizing the Strategic Plans, Final Presentation and Feedback on Strategic Plans by Participants

## 6.2 Reporting

- Submit a completion report summarizing outcomes, feedback, and recommendations.
- Issue certificates of participation to attendees.

## 7. EVALUATION PROCESS

### 7.1 Phase 1: SCM Administrative requirements

- The service provider must submit proof of registration on CSD (Central Supplier Database)/SARS PIN.
- The service provider must submit company profile
- The SBD 4 form must be completed, and signed by the authorised company representative.
- The SBD1 form must be completed, and signed by the authorised company representative.
- The POPIA consent form must be completed, and signed by the authorised company representative.
- The bidder must submit SBD 6.1 preference points claim form.

*Failure to provide the above information may lead to bidder's proposal not being considered further.*

### 7.2 Phase 2: Functionality Criteria

- Only bid proposals that meet administrative requirements will be further evaluated on functionality criteria,
- The Bidder must score a minimum of **70%** during Phase 2 (functionality / technical) of the evaluation to qualify for Phase 3 of the evaluation where only points for Price and Specific Goals Scoring will be considered.
- N.B: Service providers that fail to score a minimum of 70/100 points (equivalent to seventy percent (70)) on functionality will not be considered and evaluated further on phase 3- price.
- The service providers will be evaluated on functionality in accordance with the below functionality criteria and values:

Functional Criteria	Total
<b>1. Key Personnel (30/100):</b> Demonstrated ability of the Individual/Team to render the service and the expertise of key staff members. This must be supported with a submission of the facilitator's CV and qualification, detailing the number of years in the related field.	30
<b>Rating score values for demonstrated ability are allocated as follows:</b>  1-2 years' experience of the team = 10; 3-5 years' experience = 15; 5-10 years = 20; more than 10 years = 30	
<b>2. Number of Completed Similar Projects in the Government and Private Sector. Equivalent Points must be supported by references on the company letterheads and signed by the respective company representative, and must not be more than 5 years old (30/100):</b>  This must be supported by the submission of a list of all projects successfully completed, as well as letters of completion and references from current/previous clients.	30

<p>The bidder must attach duly signed relevant references letters to qualify for the indicated points.</p> <p>0 -reference letter provided = 0</p> <p>1 Reference letters = 10</p> <p>2 Reference letters = 20</p> <p>3-Above reference letters = 30</p>	
<p><b>3. Adequacy of the proposed workplan and methodology in responding to the terms of reference. The quality and reasonableness of the project work plan will be assessed / evaluated and therefore a detailed work program outlining the various workflow items/tasks required for this project must be submitted. (40/100)</b></p> <p>No program = 0;  Poor program (insufficient information provided) = 10  Adequate program (work items shown) = 20  Good program (all necessary work items shown) = 30  Excellent program (all necessary work items shown, including links between tasks and risks as well as additional information) = 40.</p>	40
<b>Total</b>	<b>100</b>

### 7.3 Phase 3: Price and Specific Goals Scoring

#### Pricing Considerations:

- Bidders' price quotations must be inclusive of all applicable taxes **(including VAT)**.
- Bidders total price weighs 80 points.

#### Specific Goals

- The bidder must submit SBD 6.1 preference points claim form.
- B-BBEE Certificate / Affidavit.
- Bidders' specific goals weigh 20 points.

Specific Goals Criteria	Points
<p><b>1. Promotion of enterprises located in KZN province for work to be done or services to be rendered: 8 points</b></p> <p>Copy of a utility bill for property rates and services/ valid lease agreement/ original proof of residence signed by a Ward Councillor</p>	20
<p><b>2. Women Ownership</b></p> <p>51% or more = <b>4 points</b></p> <p>ID Copies of Directors/CSD Report/BBBEE Certificate/Affidavit</p>	
<p><b>3. Race ownership: 100% Black owned</b></p> <p>Black or Indian or Colored = <b>8 points</b></p> <p>ID Copies of Directors/CSD Report/BBBEE Certificate/Affidavit</p>	
<b>Total Points</b>	<b>20</b>

*RFQ responses will be evaluated on the 80/20 Price & specific goals. Completed SBD 6.1. Preference Points Claim Form in terms of The Preferential Procurement Regulations 2022 must be completed and be submitted together with a copy of Sworn Affidavit or BBBEE Certificate to claim specific goals points. Failing to submit both will result in your company scoring zero (0) points for specific goals.*

**NB:** Tax matters for the recommended bidder will be verified on the Central Supplier Database (CSD) or SARS Efilling prior to awarding. If the bidders' tax matters are non-compliant in terms of clauses 4.2 & 4.3 will be exercised from National Treasury Instruction No. 09 of 2017/2018 (Tax Compliance Status Verification).

## **8. COMMUNICATION**

All enquiries relating to this RFQ should be sent via email: [quotations@tikzn.co.za](mailto:quotations@tikzn.co.za)

## **9. CONDITIONS TO BE OBSERVED WHEN RESPONDING TO RFQ**

No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of award/order form is prepared and executed. Quotation shall remain open for acceptance by Trade & Investment KwaZulu-Natal for a period of 90 days from the closing date of the RFQ Enquiry.

## **10. COST OF BIDDING**

The service provider shall bear all costs and expenses associated with the preparation and submission of its RFQ, and Trade & Investment KwaZulu-Natal shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

### **END OF RFQ DOCUMENT**

**Annexed to this document for completion and return with the document:**

- Quotation on a company letterhead.
- Completed and signed Declaration of Interest (SBD 4).
- Completed and signed Invitation to bid (SBD1 -Part A & B)
- Completed and signed POPIA consent form.
- Completed and signed preference points claim form (SBD6.1).
- Copy of CSD Report or MAAA Number (National Treasury).
- Information requested as per the mandatory requirements.