



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

REQUEST FOR PRICE QUOTATION

For office use only:

Reference No:	SCM NOV 019
Date RFQ Issued:	19 November 2024

Request for Quotation on behalf of the Department of Trade, Industry and Competition (the dtic)

The dtic hereby invites suitable service providers to provide the department with a quotation in accordance with requirements as per Annexure A, or in accordance with the Terms of Reference (Scope of work).

Service Provider Details

To be completed by the service provider:

Name of service provider	
CSD service provider Number	MAAA
Contact person	
Email address	
Telephone number	

Enquiry and Closing Details

For office use only:

Contact person	Ntokozo Shabane
E-mail address	NPShabane@thedtic.gov.za
Telephone number	012 394 1045
Closing date and time for quotation	29 November 2024 – 12h00
Quotations to be e-mailed to the dtic provided email	<p>Service providers must submit their functional/technical proposal folder / file via email to RFQs@thedtic.gov.za. The functional/technical proposal folder / file should only contain the functional/technical proposal, but NO financial information. Financial information in a functional proposal will lead to automatic disqualification of that specific proposal.</p> <p>The financial proposal, SBD 1, 4, 3.3 and 6.1 forms as well as <u>original / original certified copy</u> of the BBBEE certificate or Affidavit must be submitted in a SEPARATE folder / file via email to FinancialProposals@thedtic.gov.za</p>

Terms and Conditions

1. Quotations should be dated and signed preferably on the company's letterhead.
2. Quotations received after the closing date and time will not be considered.
3. Quotations received will be evaluated firstly on pre-compliance evaluation, then on functionality evaluation (IF APPLICABLE), and thereafter 80/20 point scoring basis. The 80 points will be for price and 20 points for preferential procurement specific goals.
4. No quotation will be considered from service providers employed by the state.
5. **Quotations should be valid for a minimum period of 120 days from the date the RFQ closed.**



6. All prices quoted must be VAT inclusive, service providers not registered for VAT must indicate this clearly on their quotation. For VAT vendors, if no indication is provided quotations will be evaluated as VAT inclusive.
7. **The attached SBD 1, SBD 4, SBD 3.3, SBD 6.1, RFQ with POPIA consent form must be completed in full and submitted together with the financial proposal**
8. Bidders who wish to claim for preferential procurement points applicable to this RFQ must ensure that the **SBD 6.1** claim form is completed and accompanied by the relevant proof required. **Failure on the part of the bidder to complete table 1 of SBD 6.1, it will be interpreted to mean that preference points for specific goals are not claimed irrespective of the relevant proofs attached.**
HDI(Race, Women and People with disabilities)
 - Submit proof of disability (Letter from General Practitioner/specialist with regard to your disability is required to substantiate a claim)
 - **Proof of Race and women-attach latest CSD report****Small Medium Micro Enterprises (SMME's)**
 - Sars return indicating annual turnover/ B-BBEE certificate/ CIPC B-BBEE certificate / Sworn Affidavit **fully completed as per B-BBEE guide paragraph 17****Local Procurement (Provincial / Municipal)**
 - **Proof of address (municipal rates/ bank statements/ lease agreement / affidavit **or any latest statement not older than three months containing proof of address******B-BBEE compliance based on Section 10 of the B-BBEE Act (Act 53 of 2003 as amended by Act 46 of 2013)**
 - B-BBEE certificate/ CIPC B-BBEE certificate / sworn Affidavit **fully completed as per BBBEE guide paragraph 17**
9. **Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals with the RFQ, will be interpreted to mean that preference points for specific goals are not claimed.**
10. Service providers who wish to render services to **the dtic** must register on CSD and ensure banking details are verified.
11. All prices quoted MUST be firm for the duration of the contract. Where Rate of Exchange is applicable, conditions must be stipulated on the quotation.
12. All quotations must be strictly in accordance with Annexure A.
13. **the dtic** reserves the right to appoint more than one service provider as deemed necessary, furthermore the department reserves the right not to appoint.
14. Price offered by the service provider scoring the highest points must be reasonable and market related

Please note:

EVALUATION CRITERIA

- Quotations will be evaluated based on the 80/20 preference, where 80/20 principle will apply to all procurement with a rand value of up to R50 million (all applicable taxes included)¹. 80 Points will be allocated for price and 20 points will be used for preferential procurement in line with the specific goals.
- Refer to SBD 6.1 form for specific goals
- Contract will be awarded to the bidder who scores the highest total points²
- This RFQ is line with the PREFERENTIAL PROCUREMENT REGULATION 2022

¹ "all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

² "highest total points" equals the point scored for price added to the points for preferential procurement and RDP goals.



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA



the dtic
Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

the dtic - together, growing the economy
the dtic Customer Contact Centre: 0861 843 384
the dtic Website: www.thedtic.gov.za



POPIA CONSENT FORM

The Bidder and the proposed team/ individuals proposed by the Bidding entity to perform work in line with the requirements stipulated in this request for quotation(RFQ) document, hereby give their consent to **the dtic** and its Officials involved in the evaluation / recommendation / award / drafting of SLA / verification of submissions, processing of purchase orders and invoices, to process our personal information for all purposes related to this request for quotation (RFQ) process and possible subsequent contract, in accordance with the provisions of the Protection of Personal Information (POPI) Act, 2013 (Act no. 4 of 2013) & Protection of Information Act, 1982 (Act no. 84 of 1982),

.....
Signature

.....
Date

.....
Position

.....
Name of bidder



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

ANNEXURE A

Requirement list / Specifications			
SUBJECT: TO APPOINT A SERVICE PROVIDER FOR STRATEGY DEVELOPMENT, ANNUAL PERFORMANCE PLANNING (2025-2026), AND MONITORING AND EVALUATION (M&E)			
Item No	Number of Units	Item description	
1			
2		Please refer to the attached ToR	
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			

Company Name

Signature

Date

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (DEPARTMENT OF TRADE, INDUSTRY AND COMPETITION)					
BID NUMBER:	SCM NOV 019	CLOSING DATE: 29 NOVEMBER 2024	CLOSING TIME:	12H00	
DESCRIPTION	TO APPOINT A SERVICE PROVIDER FOR STRATEGY DEVELOPMENT, ANNUAL PERFORMANCE PLANNING (2025-2026), AND MONITORING AND EVALUATION (M&E)				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
<p>Service providers must submit their functional/technical proposal folder / file via email to RFQs@thedtic.gov.za. The functional/technical proposal folder / file should only contain the functional/technical proposal, but NO financial information. Financial information in a functional proposal will lead to automatic disqualification of that specific proposal.</p> <p>The financial proposal, SBD 1, 4, 3.3 and 6.1 forms as well as original / original certified copy of the BBBEE certificate or Affidavit must be submitted in a SEPARATE folder / file via email to FinancialProposals@thedtic.gov.za</p>					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?			<input type="checkbox"/> YES <input type="checkbox"/> NO		
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: RFQ NO. **SCM NOV 019**

CLOSING TIME **12:00**

CLOSING DATE: **29 NOVEMBER 2024**

OFFER TO BE VALID FOR **60** DAYS FROM THE CLOSING DATE OF RFQ.

NB! PLEASE TAKE NOTE THAT PRICING/FINANCIALS MUST NOT BE IN THE FUNCTIONAL PROPOSAL FOLDER/FILE. FINANCIAL INFORMATION MUST ONLY BE SUBMITTED IN THE FINANCIAL PROPOSAL FOLDER/FILE, WHICH MUST BE SUBMITTED IN A SEPARATE FOLDER/FILE. FAILURE TO COMPLY HEREWITH WILL LEAD TO AUTOMATIC DISQUALIFICATION.

ITEM NO INCLUDED)	DESCRIPTION	BID PRICE IN RSA CURRENCY		
		** (ALL	APPLICABLE	TAXES

**TO APPOINT A SERVICE PROVIDER FOR STRATEGY DEVELOPMENT, ANNUAL PERFORMANCE
PLANNING (2025-2026), AND MONITORING AND EVALUATION (M&E)**

- Prices must be quoted in RSA currency and include VAT.
- Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R.....

3.	KEY STAFF AND POSITION	Hourly rates	Daily rate
	_____	R _____	_____
	_____	R _____	_____
	_____	R _____	_____
4.	Period required for commencement with project after acceptance of bid: _____		
5.	Phases according to which the project will be completed, cost per phase and man-days to be spent		
	_____	R _____	_____ days
	_____	R _____	_____ days
	_____	R _____	_____ days
	_____	R _____	_____ days

- Is the hourly rate quoted **fixed** for the full period of the contract? **YES / NO** (delete the one that is not applicable)

- ****Compliance with National Treasury Instruction on Cost Containment:**

- Air Travel will be restricted at Economy Class.
- Claims for kilometers may not exceed the rates approved by the Automobile Association of South Africa / the monthly rates published by the Department of Transport.
- Accommodation – R1350 per night, per person, including breakfast, dinner and parking (or as amended by National Treasury).
- Parking expenses will not be for the dtic's account.

Name of Bidder:

- 7.5 Travelling costs and time spent or incurred between the home and office of the consultants, including their staff and the **dtic** head office will not be for the account of the **dtic**.
- 7.6 Travel and accommodation requirements must be pre-approved by the Chief Director: ODG of the **dtic**.

" all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies. *Expenses*

BIDDERS WHO SUBMIT FINANCIAL PROPOSALS BASED ON NON-FIRM PRICES WILL AUTOMATICALLY BE DISQUALIFIED

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

SBD4

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, (name and surname) the undersigned, in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total Points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 \mathbf{Ps} = \mathbf{80} \left(\mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(\mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right)
 \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

Where

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
HDI (Race / Women/ People with disability)		2		
Local Procurement		6		
SMME's		2		
B-BBEE		10		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium

One-person business/sole propriety

Close corporation

Public Company

Personal Liability Company

(Pty) Limited

Non-Profit Company

State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE (ToR) FOR APPOINTING A SERVICE PROVIDER FOR STRATEGY DEVELOPMENT, ANNUAL PERFORMANCE PLANNING (2025-2026), AND MONITORING AND EVALUATION (M&E)

REQUEST FOR PROPOSALS:

The Department of Trade, Industry and Competition (**the dtic**) invites interested service providers to submit proposals for strategy development, annual performance planning (2025-2026), monitoring and evaluation (M&E).

1. PURPOSE

To appoint a service provider to develop strategy development, annual performance planning (2025-2026), monitoring and evaluation (M&E).

2. BACKGROUND

The Department of Trade, Industry and Competition (**the dtic**) seeks to appoint a service provider to support the development of a long-term strategic framework (2025–2030) and the Annual Performance Plan for 2025–2026. The service provider will also design and implement a comprehensive Monitoring and Evaluation (M&E) system to enhance organizational performance, ensure accountability, and facilitate audit readiness. A key component of this engagement is ensuring alignment with national policy frameworks and government priorities of the 7th Administration

The service provider will review and refine the current strategic and performance plans for the 2025 - 30 to ensure they reflect national priorities as captured in the Medium-Term Development Framework (MTDP), government frameworks, and



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

policy commitments for the 2025–2030 period, in compliance with the Revised Framework for Institutional Planning. Additionally, the service provider will assist in establishing SMART (Specific, Measurable, Achievable, Relevant, Time-bound) Indicators and targets, reporting, preparing for audits, and ensuring that proper evidence is gathered for performance reporting.

The aim is to strengthen the organization's ability to achieve its long-term objectives, improve annual performance management, and enhance its M&E system for effective reporting and informed decision-making.

3. OBJECTIVE

- The primary objectives of the engagement are to:
- Review and finalize an outcome based 2015–2030 strategic framework, ensuring alignment with the organization's goals and the operational environment.
- Develop an Annual Performance Plan for the fiscal year 2025–2026, including SMART targets, clear performance indicators, and actionable interventions for the period.
- Design and implement an M&E system that supports evidence-based decision-making, performance tracking, and audit preparation.
- Prepare the organization for internal and external audits, with a focus on ensuring data quality, accountability, and transparency.

4. METHODOLOGY

The bidder is expected to outline and explain the methodology that will be used to develop and implement a project plan for the facilitation and development of the strategy development, annual performance planning (2025-2026), monitoring and evaluation (M&E) as per the scope of work and deliverables.

5. SCOPE OF WORK

The service provider will be responsible for the following key deliverables:



5.1. Strategic Review and Finalization (2025/2030)

- Review the current draft strategic plan (2025–2030), conduct a gap analysis to ensure it remains relevant, and aligned with national priorities, the organization’s contribution to MTDP and other priorities, the departments vision and mission, considering changes in the external environment and internal capacity.
- Develop a PESTLE framework for the department and strengthen the SWOT analysis currently available for the **dtic**.
- Facilitate planning workshops with senior leadership, starting from 15 November 2024, including key stakeholders, and staff to refine and update the, strategic focus, goals, objectives, and interventions.
- Create a strategic framework that explicitly links the **dtic** objectives, outputs and impact to the 18 entities of **the dtic** group, and advise on joint planning and monitoring modalities (including organisational efficiency opportunities).
- Finalize the 2025–2030 **dtic** Strategic Plan, with a clearly defined economic storyline, theory of change impact statement, key performance indicators (KPIs), and implementation timelines.
- Provide strategic guidance on how the organization can adapt its goals for emerging challenges and opportunities.

5.2. Annual Performance Plan (2025/2026)

- **Design the Annual Performance Plan:** Develop a comprehensive Annual Performance Plan for the 2025–2026 financial year, ensuring full alignment with the updated long-term strategy for the period 2025–2030.
- **Develop SMART Indicators and Targets:** Define SMART (Specific, Measurable, Achievable, Relevant, Time-bound) indicators and targets for each departmental goal and objective to track performance and ensure measurable progress.
- **Align KPIs with outcomes:** Ensure that key performance indicators (KPIs) align with strategic goals, providing clarity on performance expectations for each department and unit.



- **Collaboration on Resources, Timelines, and Risks:** Work closely with relevant departments to identify resource requirements, establish realistic timelines, and assess potential constraints and risks associated with the execution of the plan.
- **Monitoring and Reporting Framework:** Develop monitoring and reporting templates for performance tracking, incorporating clear milestones and established review mechanisms.
- **SMART Targets and KPIs:** The service provider will develop the 2025–2026 Annual Performance Plan, incorporating SMART targets for all key performance areas (KPA) and indicators (KPIs), ensuring measurable and transparent progress.
- **Alignment with National Priorities:** Ensure the Annual Performance Plan reflects national commitments, including priorities outlined in the Medium-Term Development Plan (MTDP), the Opening of Parliament and State of the Nation Address (SONA), as well as initiatives related to the National Strategic Plan on GBVF, the Just Transition, Infrastructure Plans, and the District Development Model (DDM).
- **Performance Indicators and Milestones:** Establish clear performance indicators, reporting mechanisms, and milestones that support the annual plan, while identifying potential risks and required resources.
- **Geo-Spatial Referencing:** Ensure that all planned interventions are geo-spatially referenced according to the guidelines issued by the Department of Planning, Monitoring, and Evaluation (DPME), particularly for projects aligned with the District Development Model and spatial transformation initiatives.
- **Compliance and Audit Evidence:** Ensure that all targets, KPIs, and performance outcomes are auditable, with credible supporting data, in preparation for both internal and external audits.

5.3. Monitoring and Evaluation (M&E) System

- Design an M&E framework that supports continuous performance tracking, learning, and improvement, in line with the strategic goals and annual performance plan.
- Develop a set of tools and systems to monitor progress toward the achievement of strategic objectives and annual performance targets.



- Provide guidelines on data collection, analysis, and reporting, ensuring that all performance data is credible, accurate, and verifiable.
- Identify mechanisms for capturing qualitative and quantitative data that will be useful for performance reviews and decision-making.
- Design an M&E reporting template that is user-friendly and can be used by all departments for consistent and efficient reporting.
- Recommend and design evaluation methods for assessing the impact and effectiveness of key programs and projects.

5.4. Audit Preparation and Evidence Gathering

- Prepare the organization for internal and external audits, ensuring compliance with audit requirements and best practices.
- Advise on how to develop and maintain an effective evidence management system, ensuring that all performance claims are substantiated with accurate and verifiable data.
- Train staff on audit requirements, documentation, and evidence collection to ensure all performance reports can withstand scrutiny.
- Assist with the development of an audit trail that demonstrates clear links between strategic goals, performance targets, and results.

5.5. Final Report and Recommendations

- Prepare a final report summarizing the outcomes of the strategic review, annual performance plan development, and M&E framework design.
- Provide an implementation roadmap that outlines the steps for rolling out the performance plan and M&E system.
- Offer actionable recommendations for improving data management, performance reporting, and audit readiness.

6. DELIVERABLES

- Inception Report – Detailing the methodology, work plan, and approach for the assignment.



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

- Strategic Plan (2015–2030) – Finalized strategic framework with updated goals, objectives, KPIs, and implementation strategies.
- Annual Performance Plan (2025–2026) – An actionable plan with SMART targets, clear indicators, and resource requirements.
- Monitoring & Evaluation (M&E) Framework – A comprehensive M&E system that tracks performance, supports decision-making, and ensures evidence collection.
- Audit Preparation Framework – A set of guidelines and tools to help the organization prepare for audits and manage evidence collection.
- Final Report – A consolidated report summarizing the process, findings, and recommendations for implementation.

7. TIME FRAME

The duration of the assignment will be from date of appointment to 31 March 2026, with the following key milestones:

- Inception Report: 2 weeks from contract signing
- Strategic Review and Finalization: 4 weeks from contract signing
- Annual Performance Plan (2025–2026): 6 weeks from contract signing
- M&E Framework Design: 8 weeks from contract signing
- Audit Preparation Framework: 10 weeks from contract signing
- Final Report: 12 weeks from contract signing

Note: The timeline is indicative and may be adjusted based on project dynamics or unforeseen delays.

8. QUALIFICATIONS AND EXPERIENCE OF THE PROSPECTIVE SERVICE PROVIDER

The service provider should have the following qualifications:

- Proven experience in strategic planning, performance management, and M&E, particularly within [economic sector, public sector, development organizations].
- Expertise in developing SMART targets and annual performance plans.
- Strong understanding of audit requirements and experience in preparing organizations for internal and external audits.



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

- Knowledge of international best practices in strategy development, performance reporting, and evidence-based M&E systems.
- Strong facilitation and communication skills, with the ability to engage senior leadership and stakeholders effectively.
- Experience in designing and implementing M&E systems and tools for performance tracking and reporting.

Ability to produce high-quality written reports and deliverables;

9. CONTRACTUAL TERMS AND CONDITIONS

- Contract Duration: 18 Months
- Payment Terms: Payments will be made based on the completion of agreed deliverables (e.g., upon submission of reports and approval of milestones).
- Confidentiality: The service provider will be required to sign a confidentiality agreement to protect all sensitive information.
- Intellectual Property: All intellectual property created during the assignment will remain the property of the Department of Trade, Industry and Competition (**the dtic**).
- The service provider's performance will be reviewed based on the quality of deliverables and adherence to timelines.

10. BID EVALUATION CRITERIA

Key scores

Score	Description
0 – Non-compliant	No evidence provided to substantiate compliance
1 – Poor	Unacceptable, does not meet set requirements
2 – Average	Reasonable but not sufficient to fully satisfy the set requirements
3 – Good	Fully complies to the set minimum requirements
4 – Very Good	Above average compliance to the set requirements



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

5 – Excellent	Meets and exceeds the set requirements
---------------	--

PHASE 1: FUNCTIONAL EVALUATION

No	Criteria	Weight	Rate (0 – 5)	Total Score
1.	Relevant Qualifications of the proposed Project Leader and Project Team (key staff):			
1.1	<p>Relevant qualifications of the Project Leader must at least hold a minimum Post Graduate degree in Monitoring and Evaluation, Development Studies, Social or Public Management/Administration or equivalent qualification (NQF level 7) linked to public sector strategic planning, strategic management or Government planning will be required to attach the academic record to demonstrate the connection to the public sector strategic planning. Qualifications must be elaborated upon in CV.</p> <p>0= No Qualification 1= Certificate 2= National Diploma 3=Post graduate qualification 4= Honours 5= Masters or higher</p>	20		
1.2	<p>Relevant qualifications of the team members must at least hold a minimum Post Graduate degree in Monitoring and Evaluation, Development Studies, Social or Public Management/Administration or equivalent qualification (NQF level 7) linked to public sector strategic planning, strategic management or Government planning will be required to attach the academic record to demonstrate the connection to the public sector strategic planning. Qualifications must be elaborated upon in CV.</p>	10		



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

	0= No Qualification 1= Certificate 2= National Diploma 3=Post graduate qualification 4= Honours 5= Masters or higher			
2.	Relevant Experience of the proposed Project Leader and Project Team (key staff):			
2.1	The project leader should have experience in strategic planning, performance management, monitoring, evaluation and reporting, implementation of programmes/project monitoring, particularly within [economic sector, public sector, development organizations]. 0= 0-1 year 1 = more than 1 to 5 years 2 = more than 5 years less than 10 years 3 = more than 10 years less than 15 years 4 = more than 15 years up to 20 years 5 = more than 20 years	15		
2.2	The project team (key staff) should have experience in strategic planning, performance management, monitoring, evaluation and reporting, implementation of programmes/project monitoring, particularly within [economic sector, public sector, development organizations]. 0= 0-1 year 1 = 1 to 3 years' 2 = more than 3 years less than 5 years 3 = more than 5 years up to 8 years 4 = more than 8 years' up to 15 years 5 = more than 15 years	10		
3.	Bidding Company relevant experience in performing similar services			
3.1	The bidding company to demonstrate experience in strategic planning, performance management,	25		



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

	<p>monitoring, evaluation and reporting, implementation of programmes/project monitoring, particularly within [economic sector, public sector, development organizations] :</p> <p>0= 0-1 reference letter</p> <p>1 = 2 to 3 reference letters</p> <p>2 = 4-5 reference letters</p> <p>3 = 6-8 reference letters</p> <p>4 = 9-12 reference letters</p> <p>5 = 13 and more reference letters</p> <p>The bidding company relevant experience proven by submitting reference letters not older than 6 months on the client's letter head, signed, dated, stamped, with contact person, contact details, duration and the type of service rendered.</p>			
4	Strategic Approach and Methodology			
4.1	The service provider must be able to develop and implement a project plan for the facilitation and the development of the Methodology proposed in line with requirements stipulated in the scope of work and deliverables.	20		
	Maximum Points	100		



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

11.1. The 80/20 principle and two folder/ file system (Technical/functional proposal evaluation and financial proposal evaluation) will apply in evaluating the proposals in accordance with the Preferential Procurement Policy Framework Act; Act no 5 of 2000 its subsequent Regulations and the Preferential Procurement Policy of **the dtic. The reason for applying the **two folder/ file system** is to ensure that price does not influence the process.**

11.2. Two folder/file system

The two folder/file submission system is based on the submission of the functional and financial proposals in two separate folder / file. **NO** financial information to be contained in the functional proposal as this will lead to automatic disqualification. Submission must be done as follows:

11.3. Functional Proposal

Service providers must submit their functional/technical proposal folder / file via email to RFQs@thedtic.gov.za. The functional/technical proposal folder / file should **only** contain the functional/technical proposal, but **NO** financial information. **Financial information in a functional proposal will lead to automatic disqualification of that specific proposal.**

11.4. Financial Proposal

The financial proposal, SBD 1, 4 3.3 and 6.1 forms as well as original / original certified copy of the BBBEE certificate or Affidavit must be submitted in a **SEPARATE** folder / file via email to FinancialProposals@thedtic.gov.za ????

11.5. FAILURE TO COMPLY WITH THE TWO FOLDER/FILE REQUIREMENT WILL AUTOMATICALLY INVALIDATE THE PROPOSAL.



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

11.6. All proposals will be evaluated in terms of the two-phase process once the pre-qualifying of bids received is done. All proposals received are subject to a pre-qualification process to determine compliance with compulsory requirements / conditions. All bids that pass the pre-qualification process will then be evaluated as follows:

11.7. The functional proposals will be evaluated during the first phase. Only the proposals that score 65% and above during the first phase, will be evaluated, during the second phase. During the second phase all proposals that scored 65% and above for functionality will be scored on preferential point system: price (80 points) and specific goals (20 points). Proposals will be evaluated strictly according to the evaluation criteria stipulated below:

12

12.1. The bidders must submit their functionality/technical proposal by email to RFQs@thedtic.gov.za on or before 29 November 2024 at 12:00. No financial information to be contained in the functional proposal as this will lead to automatic disqualification.

The financial proposal, SBD 1, 4, 3.3 and 6.1 forms as well as original/original certified copy of the BBBEE certificate or Affidavit must be submitted by email to FinancialProposals@thedtic.gov.za on or before 29 November 2024 at 12:00

13. PRICE

The service provider must provide a detailed (itemized) budget quoted in South African currency (ZAR) inclusive of VAT. This should include a payment schedule linked to deliverables.

The quotation value must represent the total cost on the project which will be payable by **the dtic** to the appointed service provider upon satisfactory work delivery and as per the agreed payment schedule.



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

14. SERVICE PROVIDER'S OBLIGATIONS

- 14.1. The service provider undertakes to act as an independent contractor in respect of the work.
- 14.2. The service provider shall attend meetings with officials whenever required to do so for the purposes of obtaining information or advice with regards to the work and assignments or any matters arising there from or in connection therewith.
- 14.3. The service provider shall be responsible for its own computers and its own technical literature to adequately perform its functions.
- 14.4. The service provider shall exercise all reasonable skill, care, independence and due diligence in the execution of the work and shall carry out their obligations in accordance with international professional standards.
- 14.5. The service provider shall in all professional matters act as a faithful advisor to **the dtic** as well as respecting the laws and customs of the country in which any business in relation to the project conducted.
- 14.6. The service provider shall be deemed to have satisfied itself as to the correctness and sufficiency of the rates and prices set out in the contract for the work to be rendered.
- 14.7. The service provider shall plan and provide all possible risks that may affect the delivery project on time and what mechanisms are in place to manage such risks.
- 14.8. The service provider shall engage meaningfully with **the dtic** staff throughout the project. Be ready to assume work as soon as possible, or at an agreed time period with the Project leader.

15. CONFIDENTIALITY

- 15.1. All information pertaining to the services acquired by **the dtic** from the service provider or furnished to the service provider shall be treated as confidential by the service provider and shall not be used or furnished to any other person other than for the purposes of the services, without the written Consent of the Accounting Officer unless such information is or later becomes public knowledge, other than by breach of the afore-going.
- 15.2. The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.
- 15.3. The service provider shall ensure that proper security procedures are implemented and maintained to restrict, as far as possible, access to confidential information.



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

- 15.4. The service provider shall ensure that no confidential information is copied or reproduced without prior written approval by the Accounting Officer.
- 15.5. Failure by the service provider to comply with the provisions of this Clause shall constitute a material breach of the contract and shall constitute a ground for termination of the contract by **the dtic**, by giving the service provider thirty days' notice.

16. ENQUIRIES:

Any enquiries regarding this RQF must be addressed in writing to:

Ms. Wongiwe Masvanhise
Office of the Director-General
Email WMasvanhise@thedtic.gov.za

Or

Ms. Ntokozo Shabane
Office of the Director-General
Telephone: 012 394 3232
Email NPShabane@thedtic.gov.za