



REQUEST FOR QUOTE (RFQ)

APPOINTMENT OF A SERVICE PROVIDER FOR ATNS 2025 STRATEGY REVIEW, FACILITATION OF KEY STRATEGY SESSIONS AND CORPORATE PLAN PREPARATION.

Date:	23 August 2022
Department	ATNS: Strategy and Optimisation
RFQ Number	ATNS/RFQ090/18/07/2022/2023 Strategy Planning and Development
Description of Goods/Service:	Please see below on page 4
Closing Date and Time:	31 August 2022 @ 10h00
Expected delivery date	TBC with the appointed bidder.
Validity Period	90 days from the closing date
Compulsory Requirements:	<ol style="list-style-type: none"> 1. B-BBEE Certificate 2. Tax Pin 3. CSD Report 4. Banking Details with bank stamp 5. ID copies of members/directors 6. CK Documents 7. Pricing Schedule/Quotation 8. Signed and completed SBD Forms
Mandatory Requirements	1. Refer to page 8 for Mandatory Requirements
Compulsory Briefing / Site Inspection	N/A
Description	APPOINTMENT OF A SERVICE PROVIDER FOR ATNS 2025 STRATEGY REVIEW, FACILITATION OF KEY STRATEGY SESSIONS AND CORPORATE PLAN PREPARATION.
Quotation Delivery Address	Thokop@atns.co.za
Enquiries	Procurement Officer: thokop@atns.co.za
The ATNS requests your quotation on the goods and/or services listed hereunder and/or on the available RFQ forms. Please furnish all information as requested and return your	



quotation on the date stipulated. Late and incomplete / missing documentations will invalidate the quotation submitted. Suppliers which are not registered on the government central supplier database will not be considered. ATNS is not obliged to accept the lowest or any submission received. ATNS reserves the rights to accept the whole or any portion of a quotation.

This RFQ will be evaluated on the basis of the 80:20-point system as stipulated in the Preferential Procurement Policy Framework Act (Act number 5 of 2000) & the ATNS' Procurement Policies and Procedures.

BIDDING STRUCTURE

Indicate the type of Bidding/Biding Structure by marking with an 'X'	
Individual Bidder	
Joint Venture	
Consortium	
With Sub-Contractors	
Other	

If Individual:	
Name of Bidder	
Registration Number	
VAT Registration Number	
Contact Person	
Telephone Number	
Fax Number	
Cell Number(s)	
E-mail Address	
Postal Address	
Physical Address	

If Joint Venture or Consortium, indicate the name/s of the partners:	
Company Name	
Registration Number	
VAT Registration Number	
Contact Person	



Telephone Number	
E-mail Address	
Fax Number	
Postal Address	
Physical Address	

HAS AN VALID TAX CLEARANCE CERTIFICATE AND PIN BEEN SUBMITTED FOR CONSORTIUM, JOINT VENTURE AND/OR SUB CONTRACTORS

YES	NO

PLEASE INDICATE THE TYPE OF YOUR COMPANY E.G. PRIVATE COMPANY OR CLOSED CORPORATION OR OTHER

Indicate the Type of Company	
------------------------------	--

SIGNATURE OF BIDDER:

..... DATE:

.....
CAPACITY UNDER WHICH THIS BID IS SIGNED:



1. PURPOSE OF BID

APPOINTMENT OF A SERVICE PROVIDER FOR THE ATNS 2025 STRATEGY REVIEW, FACILITATION OF KEY STRATEGY SESSIONS AND CORPORATE PLAN PREPARATION.

2. SCOPE OF WORK

2.1 PART A

Review of the ATNS Corporate 2025 Strategy:

- Assessment of the external environment to determine the impact on the current 2025 strategy which entails review benchmarking, industry analysis, stakeholder analysis, sector and relevant SOEs performance but limited to the above
- Review of the internal organisational performance including performance in the past three years, dependencies, challenges and potential opportunities and key priorities relevant for the remaining two years of the strategy and beyond
- Review and collection of supporting information and distribution
- Determine and incorporate key sustainability trends, and opportunities and assess potential sustainability threats that may influence the corporate strategy taking into consideration current external sustainability i.e., SDGs
- Collection of supporting information and distribution

Relevant stakeholders

- Engagements, facilitation, and presentation to ATNS board
- Engagements, facilitation, and presentation ATNS Executive Committee
- Engagements, facilitation, and presentation Management Committee
- Continuous engagement with the CEO, Executives, Strategy and Optimisation department
- Engagement with relevant external stakeholders where required
- Prepare and facilitate workshop and briefing meetings



Deliverables:

- Review of the objectives and strategic initiatives
- Review of the key performance indicators
- Review of strategy implementation plans (incl. Annual Operational Plan and initiatives)
- Assessment report/gap analysis on the 2025 strategy
- Development of recommendations including road map and action plans and timelines in consultation with key stakeholders
- Solicit approval from Executive Management and Board on the reviewed strategy
- Sustainability strategy road map and inclusion in the reviewed corporate strategy

2.2 PART B

Supporting ATNS with key events aligned to the strategy review (Part A):

Corporate Plan preparation (2023/24 – 2025/26):

- Support the team in reviewing the Corporate Plan to ensure adequacy and alignment the strategy review process (Part A)
- Process review and alignment of the corporate plan to the broader corporate activities i.e., risk, materiality, performance outcomes
- Editorial and proof-reading of the corporate plan including formatting, grammar, and spelling checks.
- Facilitation in refined KPIs and targets to ensure alignment with Part A
- Facilitate the approval of the KPIs have a measurable high strategic impact on business and meet the SMART criteria
- Support the business in defining Technical Indicator Descriptors for the proposed KPIs
- Facilitate the approval of the corporate plan by EXCO and Board



Strategic planning sessions

Key events	Rationale	Possible dates	Deliverables
Exco Strategy mid-term review	Performance on the corporate 2025 strategy, BSC, Shareholder scorecard	September 2022	<ul style="list-style-type: none"> - Facilitation including Preparatory work - Resolutions, Documentation, reports, Templates, programme
Exco strategy review	Preparation of the Corporate plan in line with section 52 of the PFMA	October 2022	<ul style="list-style-type: none"> - Facilitation including Preparatory work - Resolutions, Documentation, reports, Templates, programme
Board/Exco Strategy	Approval of the Corporate in line with section 52 of the PFMA and agreement of the Corporate Scorecard	December 2022	<ul style="list-style-type: none"> - Facilitation including Preparatory work - Resolutions, Documentation, reports, Templates, programme
Board	Board approval of the corporate plans and sign-off in the Shareholder Scorecard	December and January 2022/23	<ul style="list-style-type: none"> - Facilitation including Preparatory work - Resolutions, Documentation, reports, Templates, programme
Exco Strategy	Approval of the plans and BSC.	March 2023	<ul style="list-style-type: none"> - Facilitation including Preparatory work - Resolutions, Documentation, reports, Templates, programme



1. TECHNICAL REQUIREMENTS, PRICE AND PREFERENCE POINTS

- **The First stage**, bids will be evaluated first for **Pre-Qualification Criteria (Preferential Procurement Requirements)** prescribed in Preferential Procurement Regulations. Only bids that meet Preferential Procurement requirements will be considered for further evaluation.
- **Preferential Procurement Reform:**
The Preferential Procurement Regulations, 2011 pertaining to the Preferential Procurement Policy Framework Act, Act No 5 of 2003.
- Preferential Procurement in ATNS will be implemented in line with the PPPFA and its amended Regulations. Where feasible, pre-qualification criteria for preferential procurement or subcontracting will be set to advance certain designated groups which are EMEs or QSEs which are at least 51% black owned (in line with the PPPFA). Where not feasible to set preferential procurement as a pre-qualification criteria ATNS shall evaluate suppliers in accordance with the B-BBEE Codes of Good Practice.
- The **Second stage**, Bids will be evaluated for Mandatory Technical Requirements and Functionality Evaluation . During this stage, Tender response documentation will be evaluated against compliance to the Mandatory documents required. Failure to submit Mandatory documents will result in disqualification.



Mandatory Requirement

Mandatory Criteria	Proof Required	Submitted Yes/No
Provide three (3) proof of Previous service relating to strategy planning and development and contactable references. References must be in a form of a signed reference letters on a client's business letterhead stating the scope and description of the services rendered, contract duration, with contact name, Contact number and position of the referee. Reference letters must not be older than 3 years by closing date of this RFP	YES	
Provide a company profile indicating number of years in rendering strategy planning and development & in a public and /or corporate sector (Required: Minimum 5 years)	YES	
Provide details execution plan outlining how the scope of work will be delivered including dedicated resources the project, their experience, and CVs	YES	



Functionality Evaluation

Item	Criteria	Description	Weight	Minimum Score
1	Detailed Company Profile	<p>Providing a company profile indicating number of years in rendering strategy planning and development, in a public and /or corporate sector.</p> <p>A. Company experience in strategy planning and development</p> <p>(i) More than 15 years and over = (20 points)</p> <p>(ii) More than 10 years = (15 points)</p> <p>(iii) More than 7 years = (10 points)</p> <p>(iv) More than 5 years = (5 points)</p>	20%	15%
		<p>B. Company's experience in strategy development and planning</p> <p>(i) More than 15 years and over = (20 points)</p> <p>(ii) More than 10 years = (15 points)</p> <p>(iii) More than 7 years = (10 points)</p> <p>(iv) More than 5 years = (5 points)</p>	20%	15%
2	Company Track record and contactable references	<p>References must be in a form of a signed reference letter/s on a client's business letterhead stating the scope and description of the services rendered, contract duration, with contact name, Contact number and position of the referee. Reference letters must not be older than 3 years by closing date of this tender.</p> <p>(i) More than 5 reference letters = (20 points)</p> <p>(ii) 4 reference letters = (10 points)</p> <p>(iii) 3 reference letters = (5 points)</p> <p>(iv) Less than 2 reference letters = (0 points)</p>	20%	15%
3	Project Execution/methodology and resource	<p>B. Provide proof approach and methodology in response to the scope of work:</p> <p>(i) Proof Provided on methodology/execution approach and with clear resources = (15 points)</p> <p>(ii) Proof Provided with limited methodology/execution approach and resources = (10 points)</p> <p>(iii) Proof Provided but does not meet requirement = (0 points)</p>	20%	15%



4	Capabilities	<p>Experience and qualification of key personnel (Strategy planning and development) that will be involved in executing this project supported by a minimum of 3 experienced personnel.</p> <p>(i) All 3 with >10 years' experience = (15 points) (ii) All 3 with 5 - 9 years' experience = (10 points) (iii) All 3 with < 5 = (5 points)</p> <p>Bidder to submit CVs of experienced personnel</p>	20%	15%
Minimum 75% qualifications on functionality				
Total for functionality			100%	75%

- The **Third Stage**, bids will be evaluated in terms of the **80/20 preference point systems**. Only bids that provide all documentation requested for **Mandatory Requirements** will be evaluated in accordance with the **80/20** preference point system.

Stage 1- Price/B-BBEE Evaluation.

- Tenderers will be evaluated in terms of the 80/20 preference point system, where a maximum of 80 points are allocated for price and a maximum of 20 points are allocated in respect of the level of B-BBEE contribution of the Tenderer.
- Points are allocated in terms of the BBBEE Codes of Good Practice guideline as indicated in the table below. Bidders must submit valid BBBEE Certificates which will be verified.



- Quotations will be evaluated in terms of Preferential Procurement Policy Framework Act using the 80:20 points system. 80 points will be awarded for price and 20 points for BEE points claimed.

Points for price	80
Points for B-BBEE (Max of 20):	20
B-BBEE status Level of Contributor	Number of Points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-Compliant contributor	0



2. SUBMISSION INSTRUCTIONS:

2.1.1 Potential service providers are requested to provide a quotation that addresses all the items listed in the specification section as stated above.

2.1.2 Failing to comply with the instruction will lead to bids being disqualified.

2.1.3 Each quotation should also include the following information:

1. The **expiration date for the Quotation**, if any.
2. Details of the contact person dealing with the quotation.
3. CSD Summary Report.
4. Black Economic Empowerment status of the service provider or legal identity of B-BBEE partner as well as the physical and postal address of the B-BBEE partner and capital structure.

Should it be necessary for a supplier to obtain clarity on any matter arising from or referred to in this RFQ document, please refer your enquiries, in writing, to the contact person(s) listed below. ATNS reserves the right to place responses to such queries on the website.

PROCUREMENT OFFICER:	Thoko Phukubye
TELEPHONE:	011 607 1000
E-MAIL:	thokop@atns.co.za

3. SUBMISSION OF QUOTATION:

The RFQ Documents shall be delivered to the below:

Email to thokop@atns.co.za



PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	ATNS/RFQ090/18/07/2022/2023 Strategy Planning and Development	CLOSING DATE:	31 August 2022	CLOSING TIME:	10h00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR ATNS 2025 STRATEGY REVIEW, FACILITATION OF KEY STRATEGY SESSIONS AND CORPORATE PLAN PREPARATION.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
RFQ can be sent by emailed to: thokop@atns.co.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Thoko Phukubye		CONTACT PERSON		
TELEPHONE NUMBER	011 675 1478		TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	thokop@atns.co.za		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:	MAA
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]

<p>1.1.1.1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>[IF YES ENCLOSE PROOF]</p>	<p>1.1.1.2. ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>[IF YES, ANSWER THE QUESTIONNAIRE BELOW]</p>
--	---	---	--

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?
 YES NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? YES
 NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?
 YES NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?
 YES NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?
 YES 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:

.....



1 PROTECTION OF PERSONAL INFORMATION

- 1.1 The Service Provider shall ensure that its employees, representatives and officers, comply with the provisions of the Protection of Personal Information Act, 2013 (“**POPIA**”) and all other applicable data protection laws and, without limitation to the foregoing, shall ensure the security and confidentiality of all Personal Information processed by that Party is in accordance with POPIA and all other applicable data protection laws.
- 1.2 The Service Provider must only process personal information of the Company and third parties on behalf of the Company, with the Company’s knowledge or authorisation, treat such information which comes to their knowledge as confidential and must not disclose it unless required by law or in the course of the proper performance of the Service Provider’s duties. The Service Provider must comply with the responsible party’s obligations in clause section 19 of POPIA.
- 1.3 Where the Service Provider, its agents, subcontractors, officers, directors, shareholders, representatives, or employees has/have access to any Personal Information held by the Company for any reason in connection with this Agreement or is/are supplied with or otherwise provided with Personal Information by the Company or on behalf of the Company for any purpose, or are supplied with or otherwise provided with Personal Information relating to the Services, the Service Provider shall:
- 1.3.1 process such Personal Information only for purposes of performing its/their obligations under this Agreement and shall not otherwise modify, amend or alter the contents of such Personal Information or disclose or permit the disclosure of such Personal Information to any third party, unless specifically authorised to do so by the Company or as required by law or any regulatory authority, and shall take all such steps as may be necessary to protect and safeguard such Personal Information;
- 1.3.2 without prejudice to the generality of the foregoing, ensure that appropriate,



reasonable technical and organisational measures shall be taken by it/them to prevent –

- 1.3.2.1 the unauthorised or unlawful processing of such Personal Information; and
 - 1.3.2.2 the accidental loss or destruction of, or damage to, such Personal Information; and
 - 1.3.2.3 promptly notify the Company when it becomes aware of any unauthorised, unlawful or dishonest conduct or activities, or any breach of the terms of this Agreement relating to Personal Information.
- 1.4 The Service Provider shall be liable for all claims, demands, actions, costs, expenses (including but not limited to reasonable legal costs and disbursements), fines, losses and damages arising from or incurred by reason of any wrongful processing of any Personal Information by the Service Provider (including its agents, subcontractors, officers, representatives or employees) for any breach of its obligations or warranties.
- 1.5 Both Parties will comply with their obligations under POPIA in relation to personal information for which they are the responsible party.
- 1.6 The Service Provider must notify the Company immediately where there are reasonable grounds to believe that personal information has been accessed or acquired by any unauthorised person (Data Breach) and must assist the Company, at its own cost: a) with any investigation or notice to the Regulator or data subjects that the Company may make in relation to a Data Breach; and b) in responding to any directions by the Regulator to publicise the Data Breach, including assisting the Company to make public announcements if required.
- 1.7 The Service Provider indemnifies the Company against any civil or criminal action or administrative fine or other penalty or loss as a result of the Service Provider's breach of this clause.



POPIA CONSENT

- 1.1 The Service Provider, by submitting its proposal/ quotation, consents to the use of his/her personal information contained therein and confirms that:
 - 1.1.1 The information is voluntarily supplied, without undue influence from any party; and
 - 1.1.2 The information is necessary for the purposes of the engagement with ATNS.
- 1.2 The tenderer acknowledges that he /she is aware of his/her right to:
 - 1.2.1 Access the information at any reasonable time for the purposes of rectification thereof;
 - 1.2.2 Object to the processing of the information;
 - 1.2.3 Lodge a complaint with the Information Regulator.