



## **NOTICE NUMBER: SCTIE MINI 05 2023**

### **TERMS OF REFERENCE FOR INVESTMENT PROSPECTUS CONTENT**

#### **1. BACKGROUND**

The Ugu District is a region of unlimited potential and opportunities. Whether one is interested in tourism, agriculture, film, real estate investments this region has the potential to turn that interest into a success.

South Coast Tourism and Investment Enterprise (SCTIE) is mandated to

- drive the economy of the region through positioning it as a tourism and investment destination, and be the official economic development arm,
- proactively identify and unlock the full tourism, trade and investment potential of the region. This will involve engaging with all role players to attract tourists and assist investors looking to branch out into the district uncover opportunities.

#### **Vision**

Our vision is to unlock the full economic potential of the Ugu District

#### **Mission**

Our mission is to transform, grow and develop an integrated, sustainable economy through strategic interventions and partnerships.

#### **1.1 Investment Primary Roles**

The Investment & Development unit is positioned to perform the following primary roles:

1. Identify and unlock the investment potential and opportunities
2. Package and implement catalytic projects in identified sectors that have the potential to support economic growth and stimulate job creation
3. Attract investment and promote the region as an investment destination,
4. Being the first point of contact for international and local investors wanting to establish or expand their operations in the district
5. Build strategic relationships with (and connect) industry players, government authorities and the business community,
6. Offer access to networks, joint ventures, partnerships and supplier databases to enhance matchmaking opportunities.
7. Facilitate, offer guidance and lead discussions with clients and service providers in identified or targeted investment areas
8. Identify dynamic players in the market and build compelling business cases for organizations wanting to invest in the KZN South Coast.

## Investment Attraction Primary Roles & Responsibilities

To support and attract investment, the function will provide services focusing on

1. **Site allocation:** Provide information highlighting the benefits of locations around the Ugu District and help identify suitable commercial premises.
2. **Customized market intelligence:** Collate up-to-date market intelligence, including economic and sector-investment profiles, business opportunities and trade conditions in the district.
3. **Accessing finance:** Facilitate meetings with potential public and private funders, private individuals, banks and private equity firms to help unlock financing opportunities.
4. **Policy advocacy:** Identify factors that could constrain investment and work with decision-makers to find ways of breaking down barriers to operating in the district.
5. **Accessing incentives:** Provide guidance and information to help investors understand the national, provincial and local incentives available to businesses in their sector.
6. **Immigration guidance:** Develop relations with immigration consultants who can help clients obtain the necessary documentation for employees in South Africa.

## 2. THE PRODUCTION OF THE INVESTMENT PROSPECTUS

South Coast Tourism & Investment Enterprise (SCTIE) wishes to appoint a reputable, experienced service provider that will conduct research on Ugu District economic sectors that will be verified and packaged for the compilation of Investment Prospectus.

The research data collection will attend to the following objectives for the prospectus to be an effective marketing tool for SCTIE:

- Provide a valuable resource to help investors identify potential locations and emerging opportunities
- Offer investors actionable intelligence and localised insight into the sector make-up of the economy and market conditions.
- Identify priority investment sectors (e.g., infrastructure, real estate, agriculture, etc.) through extensive research and stakeholder engagements,
- Enhance information transparency by offering information on specific investment opportunities.
- Provide an understanding of opportunities in the region and help achieve economic development solutions.

## 3. PROPOSED FOCUS

The service provider to be appointed needs to come up with a clear proposed plan that will need to be followed in order to come with a clear strategy to answer the project objectives.

**The research must address the following questions:**

- a. Who we are? (SCTIE)
- b. Profile the region, location, the district economic overview etc.
- c. Why invest in the KZN South Coast? What makes it attractive to invest here?

- d. Focus on growth sectors and opportunities e.g., tourism, real estate, agro-processing, manufacturing etc.

#### 4. BUDGET

The proposal must indicate the proposed budget in order to complete the assignment.

#### 5. TIMELINES

The proposal must indicate the expected timelines in order to complete the assignment and it should not exceed three months from collecting of data to authenticating the same data.

#### 6. TEAM COMPOSITION

The proposal must indicate the team composition, indicating the key role players that would be available in executing this assignment.

#### 7. EVALUATION CRITERIA

All quotations will be evaluated for functionality and B-BBEE 80/20 preference point system. Based on the results of the evaluation process, SCTIE will approve the preferred service provider.

Service provider that scores the minimum of 70% on functionality will proceed to the second stage of evaluation.

Competence	Competence factors	Key Aspects of Criterion	Points
Company Experience (30%)	Number of years involved in similar development	5 years and above working experience	30
		3-4 years working experience	20
		1-2 years working experience	10
Instrument design (30%)		Feasibility, Presentation & Execution, Interpretation & Consolidation	10 for each= 30
Capacity (40%)	Project leader	5 and more projects completed	30
		Less than 5 projects completed	10
	Operational capacity	5 and more team members for the assignment	30
		Less than 5 team members for the assignment	10

**Service providers are required to be registered on the Central Supplier Database. It is the responsibility of the supplier to provide us with the most recent printout from CSD, whilst also providing us with their CSD registration number.**

Quotations must be marked: **SCTIE MINI 05 2023** and must be sent to or delivered to **16 Bisset Street, Port Shepstone, 4240** by no later than **17 February 2023 at 12H00.**

For all transactions exceeding R15000.00 a valid Tax Clearance Certificate or the SARS Pin from SARS must be furnished.

The attached MBD 1 and MBD 4 must be filled, signed and submitted with the quote.

NB: Members or Directors of Companies or service providers who are state employees are not allowed to bid or quote.

**FAILURE TO COMPLY WITH THESE CONDITIONS MAY INVALIDATE YOUR OFFER.**

All queries in respect of the above should be addressed to Lihle on 039-682 9744 or [Lihle@sctie.co.za](mailto:Lihle@sctie.co.za).

SCTIE does not bind itself to accept the lowest or any quotation and reserves the right to accept the whole or any part of the quote.

<p>COMPANY</p> <p>STAMP</p> <p>COMPANY STAMP</p>	<p>COMPANY FULL NAME</p> <p>AUTHORISED SIGNATURE FULL NAME &amp; SIGNATURE</p>
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## PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF MUNICIPALITY/ MUNICIPAL ENTITY)</b>					
BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (MBD7).</b>					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELL PHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					
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 PART B:3 ]	
TOTAL NUMBER OF ITEMS OFFERED			TOTAL BID PRICE	R	
SIGNATURE OF BIDDER	.....		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>			<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>		
DEPARTMENT			CONTACT PERSON		
CONTACT PERSON			TELEPHONE NUMBER		
TELEPHONE NUMBER			FACSIMILE NUMBER		
FACSIMILE NUMBER			E-MAIL ADDRESS		
E-MAIL ADDRESS					

**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 ONLINE**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

**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 VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART B:3.
- 2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

**3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS**

- 3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  YES  NO
- 3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA?  YES  NO
- 3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  YES  NO
- 3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  YES  NO
- 3.5. 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 ABOVE.**

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.  
NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.**

SIGNATURE OF BIDDER: .....

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

DATE: .....

SOUTH COAST TOURISM AND INVESTMENT ENTERPRISE	Supplier Application Form	Date:
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**DECLARATION OF INTEREST**

- 1 No bid will be accepted from persons in the service of the state.
- 2 Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest.

3 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1 Full Name: .....

3.2 Identity Number: .....

3.3 Company Registration Number: .....

3.4 Tax Reference Number:.....

3.5 VAT Registration Number: .....

3.6 Are you presently in the service of the state? .....YES / NO

3.6.1 If so, furnish particulars.....

3.7 Have you been in the service of the state for the past twelve months? .....YES / NO

3.7.1 If so, furnish particulars.....  
.....

3.8 Do you, have any relationship (family, friend, other) with persons in the service of the state who may be involved in the evaluation and / adjudication of this bid? .....YES?NO

3.8.1 If so, furnish particulars.....  
.....

3.9 Are you, aware of any relationship (family, friend, other) between a bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? .....YES / NO

3.9.1 If so, furnish particulars.....  
.....

3.10 Are any of the company's directors, managers, principal shareholders or stakeholders in service of the state?.....YES / NO

3.10.1 If so, furnish particulars.....  
.....

3.11 Is any spouse, child or parent of the company's directors, managers, principal shareholders or

stakeholders in service of the state?.....YES / NO

3.11.1 If so, furnish particulars.....

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<b>SOUTH COAST TOURISM AND INVESTMENT ENTERPRISE</b>	<b>Supplier Application Form</b>	<b>Date:</b>
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**SECTION E:  
DECLARATION**

I/WE, THE UNDERSIGNED, WARRANTS THAT I AM/WE ARE DULY AUTHORISED TO DO SO ON BEHALF OF THE ENTERPRISE TO CERTIFY THAT THE INFORMATION SUPPLIED IN TERMS OF THIS DOCUMENT WITH ADDITIONAL INFORMATION IS CORRECT AND ACCURATE AND ACKNOWLEDGES THAT

1. The enterprise complies with all requirements for recognition as a Black / Priority Population Group / Black Business Enterprise / Priority Business Enterprise / Woman Business Enterprise / Disabled Person Enterprise / SMME (Delete as applicable) as defined, and
2. The contents of this Affidavit are within my personal knowledge, and save where stated otherwise are to the best of my belief both true and correct.
3. The enterprise will be required to furnish documentary proof if requested to do so.
4. If the information supplied is found to be incorrect then South Coast Tourism and Investment Enterprise in addition to any remedies, it may have; may
  - i Recover from the Enterprise all costs, losses or damages incurred or sustained by the Municipal Entity as a result of the award of any business, and/or
  - ii Take any other action as may be deemed necessary.

Signature.....

Name.....

I.D  
Number.....

Duly authorised to sign on behalf of:

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Address.....

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Telephone.....

