



## REQUEST FOR QUOTATION (RFQ) FOR PROCUREMENT OF GOODS AND SERVICES

### DESCRIPTION OF WORK

Facilitation of in-house Microsoft Excel Training by a  
credible service provider.

### QUOTATION DETAILS

QUOTATION NUMBER: TP11/03/2025

CLOSING Date: 10 APRIL 2025  
DATE

Time: 12:00 pm

Compulsory Briefing session:

Yes

☐

No

☒

If Yes, Date and time of compulsory briefing  
session:

Date: \_\_\_\_\_ Time: 10:00 am

### DETAILS OF RESPONDENT

Name of bidder: \_\_\_\_\_

*Please indicate whether it is the original or copy, tick the applicable block*

ORIGINAL

☐

COPY

☐

## **REQUEST FOR QUOTATIONS (RFQ)**

### **1. GENERAL CONDITIONS OF THE RFQ:**

- 1.1. The 80/20 evaluation criteria for requirements with a Rand value of up to R50 000 000 (all applicable taxes included) will be used for this bid.
- 1.2. The value of this bid is estimated not exceed R1 000 000.00 (all applicable taxes included).
- 1.3. Fully comply with the scope of work / service or **(Attached Scope of work / service)**
- 1.4. Quotations must be valid for a period of 30 days
- 1.5. The Bidder's quotation to bear correct contact details and address
- 1.6. Fully completed Standard Bidding Documents (SBD4 and SBD 6.1)
- 1.7. This bid will **NOT** be evaluated on functionality

### **2. SCOPE OF WORK / SERVICE OR ITEMS**

<b>No</b>	<b>Scope of work</b>	<b>Number of employees</b>
1.	Facilitation of an in-house Microsoft Excel training – <b>Basic level</b>	11
2	Facilitation of an in-house Microsoft Excel training – <b>Intermediate level</b>	35
3	Facilitation of an in-house Microsoft Excel training – <b>Advanced level</b>	30

#### **NOTE:**

**SEE ATTACHED DETAILED SPECIFICATIONS OF REQUIRED LEARNING OUTCOMES FROM THE TRAININGS**

**Submissions and enquiries should be directed at:**

[scm@mega.gov.za](mailto:scm@mega.gov.za)

# **Basic Excel**

Basic Excel refers to the fundamental features and functions that help users work with spreadsheets effectively. It's all about learning how to input data, perform simple calculations, and use basic tools to organize and format data. Here's what it typically entails:

## **1. Basic Navigation:**

- Understanding the layout of Excel, including rows, columns, and cells.
- Knowing how to move around the spreadsheet, select cells, and use shortcuts to navigate quickly.

## **2. Data Entry:**

- Entering numbers, text, and dates into cells.
- Adjusting cell size, formatting numbers, and text for clarity (e.g., bold, italics, font size, and colors).

## **3. Basic Formulas and Functions:**

- SUM: Adding a range of numbers.
- AVERAGE: Calculating the average of numbers.
- MIN and MAX: Finding the smallest or largest value in a range.
- COUNT: Counting the number of entries (including numbers).
- IF (basic): Conditional statements for simple decision-making.

## **4. Basic Formatting:**

- Font and cell formatting: Changing font type, size, color, and alignment.
- Cell styles and themes to organize data in a readable way.
- Number formatting (e.g., currency, percentage, date formatting).

## **5. Sorting and Filtering Data:**

- Sorting: Organizing data in ascending or descending order.
- Filtering: Displaying specific data based on certain criteria (e.g., only showing rows where a value meets a condition).

## **6. Basic Charts:**

- Creating simple charts like bar charts, pie charts, and line charts to visually represent data.
- Formatting charts to make them more readable (e.g., adding titles and adjusting colors).

## **7. Basic Cell Referencing:**

- Relative References: Understanding how cell references (like A1, B2) change when you copy formulas.
- Absolute References: Using the dollar sign (\$) to lock specific rows or columns when copying formulas (e.g., \$A\$1).

## **8. Basic Spreadsheet Management:**

- Inserting and deleting rows/columns.
- Renaming sheets and adding new sheets to organize data better.
- Freezing panes to keep headers visible while scrolling.

## **9. Basic Conditional Formatting:**

- Highlighting cells based on specific rules (e.g., making cells turn red if values are below a certain number).

## **10. Basic File Management:**

- Saving, opening, and printing Excel files.

Understanding file formats like .xlsx, .xls, and .csv

# **Intermediate Excel**

Intermediate Excel involves skills that go beyond the basics but aren't as complex as advanced Excel techniques. It focuses on improving productivity and enabling users to handle more sophisticated tasks and analyses. Here's what it generally entails:

## **1. Advanced Formulas and Functions:**

- IF Functions (advanced): Using nested IFs for more complex conditions or IFERROR to handle errors gracefully.
- COUNTIF and SUMIF: Conditional counting and summing based on specific criteria.
- VLOOKUP and HLOOKUP: Looking up data in tables based on specific values (vertical and horizontal lookup).
- INDEX and MATCH: More flexible alternatives to VLOOKUP for looking up data, especially in large datasets.
- TEXT Functions: Working with strings of text using functions like LEFT, RIGHT, MID, CONCATENATE (or TEXTJOIN in newer versions), LEN, and TRIM.
- DATE Functions: Using TODAY, DATEDIF, MONTH, YEAR, EDATE, etc., to manipulate dates and calculate time differences.
- ROUND, ROUNDUP, and ROUNDDOWN: Rounding numbers to a specific decimal place.

## **2. Working with Data:**

- Data Validation: Setting rules for what data can be entered in cells (e.g., restricting input to specific numbers or dates, creating dropdown lists).
- Sorting & Filtering: More advanced filtering options such as using multiple criteria, sorting by custom lists, or filtering with conditions (e.g., text filters like contains, starts with).
- Text-to-Columns: Splitting text into different columns based on delimiters (e.g., commas or spaces).

## **3. Pivot Tables:**

- Creating and modifying Pivot Tables for summarizing, analyzing, and grouping large data sets.

- Using multiple fields in Pivot Tables (e.g., dragging multiple fields into rows, columns, or values).
- Grouping data within Pivot Tables (e.g., grouping dates by month or quarter).
- Creating and using Pivot Charts for visual representation of Pivot Table data.

#### **4. Data Formatting:**

- Conditional Formatting: Applying formatting rules to cells based on specific conditions (e.g., color scales, icon sets, or highlighting duplicates).
- Custom Number Formatting: Using custom number formats for dates, times, percentages, etc.
- Cell Styles: Using predefined or custom styles to format data consistently across your workbook.

#### **5. Named Ranges:**

- Defining and using named ranges to simplify formula references, especially in large workbooks.

#### **6. Basic Data Analysis:**

- Goal Seek: Using Goal Seek to find the input value needed to achieve a specific result in a formula.
- Scenario Manager: Creating different scenarios (e.g., best case, worst case) to evaluate the impact of different inputs on the outcome.
- Subtotals: Applying subtotal functions to break down data into groups and calculate sums, averages, etc.

#### **7. Charts and Graphs:**

- Creating and formatting more advanced charts like scatter plots, area charts, or combo charts (combining different chart types in one).
- Customizing charts (e.g., adding trendlines, changing chart types, and adjusting axis).
- Creating Dynamic Charts using named ranges or tables.

#### **8. Working with Large Data Sets:**

- Filtering and sorting large data sets based on multiple conditions.
- Using Tables (structured references) to manage and analyze data more efficiently.
- Freeze Panes and Split View for easier navigation through large data sets.

#### **9. Collaboration and Sharing:**

- Sharing workbooks and using the Track Changes feature to collaborate with others.
- Protecting Sheets and Workbooks: Setting permissions to protect data and restrict certain changes.

#### **10. Basic Macros (VBA):**

- Recording basic macros to automate repetitive tasks.
- Introduction to VBA (Visual Basic for Applications) for writing simple scripts to automate processes (e.g., formatting, copying data).

### **11. Power Query (Optional for intermediate users):**

- Importing, cleaning, and transforming data from multiple sources (Excel files, databases, CSV, etc.) using Power Query.
- Using Power Query Editor to filter, reshape, and clean data before analyzing it in Excel.

### **12. Managing Multiple Worksheets:**

- Linking data between multiple worksheets.
- Consolidating data from multiple sheets into a summary.
- Using functions like INDIRECT to reference different sheets dynamically.

Intermediate Excel skills allow users to go beyond simple data entry and perform more complex calculations, create better visualizations, and improve overall data management and analysis. These skills are useful in tasks like budgeting, reporting, and more advanced data analysis.

## **Advance Excel**

Advanced Excel involves a deeper understanding and use of various features and tools within Excel to perform complex tasks, analyze data, automate processes, and visualize information. Some of the key aspects include:

### **1. Formulas and Functions: Beyond basic ones, this includes advanced functions like:**

- VLOOKUP, HLOOKUP, and INDEX/MATCH for data lookup and analysis.
- IF, SUMIF, COUNTIF, and ARRAY formulas for conditional operations.
- TEXT functions (like LEFT, RIGHT, MID) for manipulating text data.
- Date and time functions for handling date calculations.

### **2. Pivot Tables and Pivot Charts:**

- These allow for summarizing large data sets quickly, allowing users to aggregate, filter, and analyze information dynamically.
- Advanced manipulation of Pivot Tables for grouping, sorting, and complex reporting.

### **3. Data Analysis Tools:**

- Data Analysis ToolPak for statistical analysis (e.g., regression analysis, ANOVA).
- Solver for optimization and problem-solving.
- Power Query to clean, transform, and load data from different sources.

### **4. Macros and VBA (Visual Basic for Applications):**

- Writing custom scripts to automate repetitive tasks.
- Using VBA to create custom functions, automate workflows, and integrate Excel with other applications.

### **5. Data Visualization:**

- Creating advanced charts like waterfall charts, sparklines, and heat maps.

- Customizing charts for clearer and more insightful presentations.
- Conditional formatting to visually highlight key data points.

**6. Advanced Filtering and Sorting:**

- Using complex criteria and custom filters to manage large data sets efficiently.

**7. Tables and Named Ranges:**

- Working with structured tables for better data management and referencing, which makes it easier to work with large sets of data.
- Using dynamic ranges to make your formulas more flexible.

**8. What-If Analysis:**

- Techniques like Goal Seek and Scenario Manager to analyze different possibilities and make predictions based on data.

**9. Power Pivot:**

- Using the Data Model to create relationships between different data tables for enhanced analysis.

**10. Collaboration and Security:**

- Sharing workbooks, tracking changes, and protecting sheets and workbooks with passwords.

## 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 interest<sup>1</sup> 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.

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<sup>1</sup> 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.



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, the undersigned, (Name).....  
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 consortium<sup>2</sup> 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.
- 3.4 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.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring 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.
- 3.6 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**

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<sup>2</sup> 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.

**SBD4**

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

a) The applicable preference point system for this tender is the **80/20** preference point system.

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
<b>PRICE</b>	<b>80</b>
<b>SPECIFIC GOALS</b>	
Enterprise owned by Black people	4
Enterprise owned by Women	4
Enterprise owned by Youth	4
Enterprise owned by Disabled	4
Enterprise owned by SMME's-QSE and EME	4
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 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:

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

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)
Enterprise owned by Black people	N/A	4	N/A	
Enterprise owned by Women	N/A	4	N/A	
Enterprise owned by Youth	N/A	4	N/A	
Enterprise owned by Disabled	N/A	4	N/A	
Enterprise owned by SMME's-QSE and EME	N/A	4	N/A	

#### **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:** .....

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