



Transport Education Training Authority

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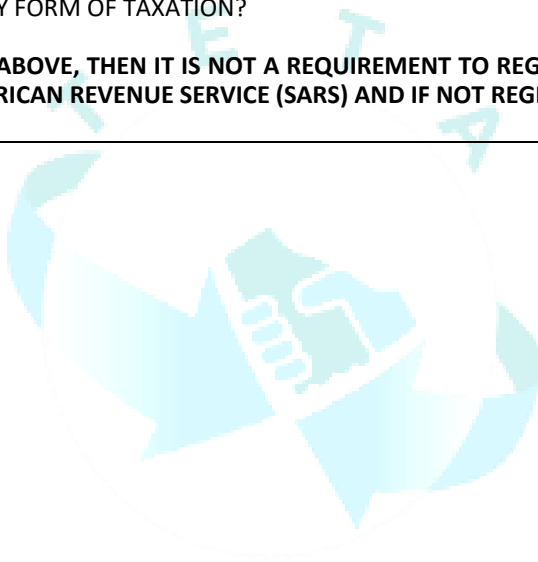
INVITATION TO BID

SBD 1

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (TRANSPORT EDUCATION TRAINING AUTHORITY)						
BID NUMBER:	TETA21/RESEARCH/0004/STUDY (POST SCHOOL)		CLOSING DATE:	14 JUNE 2021	CLOSING TIME:	11:00
DESCRIPTION	REQUEST FOR BID FROM SERVICE PROVIDERS TO CONDUCT A COMPREHENSIVE STUDY TO IDENTIFY FACTORS WHICH HINDER ACCESS AND SUCCESS IN POST SCHOOL EDUCATION AND TRAINING, AND THE IMPLICATIONS FOR THE DEMAND AND SUPPLY SKILLS TO THE TRANSPORT SECTOR.					
VALIDITY PERIOD	NINETY (90) DAYS AFTER THE CLOSING DATE					
BRIEFING SESSION	DATE: NO BRIEFING SESSION DUE TO COVID 19 REGULATIONS			TIME: N/A		
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)						
344 PRETORIA AVENUE						
FERNDALE						
RANDBURG						
2194						
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON	Mr Zukisani Mangaliso		CONTACT PERSON	Mr Zukisani Mangaliso		
TELEPHONE NUMBER	011 – 577 7026		TELEPHONE NUMBER	011 – 577 7026		
FACSIMILE NUMBER			FACSIMILE NUMBER			
E-MAIL ADDRESS	tenders@teta.org.za		E-MAIL ADDRESS	tenders@teta.org.za		
SUPPLIER INFORMATION						
NAME OF BIDDER						
POSTAL ADDRESS						
STREET ADDRESS						
	CODE		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]		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX]	

Request for Bid

	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes No <input type="checkbox"/>
[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.			



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**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:



SCHEDULE 1

INVITATION TO BID - SBD 1 (pp 1-3) PLUS GENERAL INFORMATION BELOW (pp 4-15)

1 CONFIDENTIAL INFORMATION DISCLOSURE NOTICE

- 1.1 This document may contain confidential information that is the property of the TRANSPORT EDUCATION and TRAINING AUTHORITY (TETA).
- 1.2 No part of the contents may be used, copied, disclosed or conveyed in whole or in part to any party in any manner whatsoever other than for preparing a proposal in response to this Bid, without prior written permission from TETA.
- 1.3 All copyrights and Intellectual Property herein vests with TETA.

2 INTRODUCTION

2.1 Purpose

- 2.1.1 The purpose of this Request for Bid (RFB) is an invitation to potential suppliers (hereinafter referred to as "Bidders") to submit Bids for the items/products/solutions or services as detailed under **Schedule4**: Specification or Terms of Reference

2.2 Objectives

- 2.2.1 The following objectives must be achieved with the implementation of the above required solution:
 - The rendering of the required services as per the terms of reference.
 - Compliance with all relevant legislations and regulations.
 - Signing of the Service Level Agreement (SLA) and Contract with TETA.
- 2.2.2 Based on the Bids submitted and the outcome of the evaluation process according to the set evaluation criteria TETA intends to select a preferred bidder/s with the view of concluding a service level agreement (SLA) with such successful bidder. The Bid will be evaluated in terms of the **PPPFA 80/20** preferential points system.

2.3 Queries

- 2.3.1 Should it be necessary for a bidder to obtain clarity on any matter arising from or referred to in this RFB document, please refer queries, **in writing**, to the contact person(s) listed below. Under no circumstances may any other employee within TETA be approached for any information. Any such action might result in a disqualification of a response submitted in competition to the RFB. TETA reserves the right to place responses to such queries on the website.

Mr Zukisani Mangaliso	Telephone	(011) 577 7026
	E-mail	tenders@teta.org.za

3 DEFINITIONS

- 3.1 Transport Education and Training Authority [hereinafter referred to as “TETA”] was in terms of the provisions of the Skills Development Act (Act No. 97 of 1998), established as a SETA in March 2000, together with other 24 SETA’s by the Minister of Labour. The establishment of TETA has enabled the long standing need for a mechanism that can provide skills in the transport industry.
- 3.2 TETA exists to ensure that the provisions of the Skills Development Act are implemented and complied with as contemplated by the Act, and to develop and improve skills in the transport sector under the auspices of the Department of Transport. TETA is required to promote facilitate, monitor and research education and training in the Transport Sector.
- 3.3 **“Acceptable Bid”** - means any bid, which, in all respects, complies with the specifications and conditions of the Request for Bid as set out in this document.
- 3.4 **“Act”** – means the Preferential Procurement Policy Framework Act (Act No. 5 of 2000).
- 3.5 **“Agent”** – means a person mandated by another person (“the principal”) to do business for and on behalf of or to represent in business transaction, the principal, and thereby acquire rights for the principal against an organ of state and incur obligations binding the principal in favour of an organ of state.
- 3.6 **“Bid”** - means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services or goods.
- 3.7 **“Bidders”** - means any enterprise, consortium or person, partnership, company, close corporation, firm or any other form of enterprise or person, legal or natural, which has been invited by TETA to submit a bid in response to this bid invitation.
- 3.8 **“Client”** - means internal and external customers that participate in TETA registration processes.
- 3.9 **“Comparative Price”** - means the price after deduction or addition of non-firm price factors, unconditional discounts, etc.
- 3.10 **“Consortium”** - means several entities joining forces as an umbrella entity to gain a strategic collaborative advantage by combining their expertise, capital, efforts, skills and knowledge for the purpose of executing this tender.
- 3.11 **“Disability”** - means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.
- 3.12 **“Firm Price”** - means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition or abolition of customs or excise duty and any other duty, levy or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has influence on the price of any supplies or the rendering cost of any service, for the execution of a contract.
- 3.13 **“Goods”** – means any work, equipment, machinery, tools, materials or anything of whatever nature to be rendered to TETA or TETA’s delegate by the successful vendor in terms of this bid.
- 3.14 **“Historically Disadvantaged Individual” (HDI)** - means a South African citizen:
- 3.14.1 Who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983, (Act No. 110 of 1983) or the Constitution of the Republic of South Africa, 1993 (Act No. 200 of 1993) (the Interim Constitution); and/or;

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- 3.14.2 who is a female; and/or
- 3.14.3 who has a disability;
- 3.15 *provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution is deemed not to be an HDI.*
- 3.16 **“Internal Collaboration”** - *means collaborative arrangements within a group of companies or within various strategic business units/subsidiaries/operating divisions in order to gain a strategic position whilst sharing resources, profits and losses as well as risks.*
- 3.17 **“Joint Ownership”** - *(also known as equity JVs) means the establishment by two parent companies of a child company for a specific task within which both parent companies invest in order to overcome the limited capabilities vested within them in order that they can both benefit from the combined investment.*
- 3.18 **“Joint Venture” - (Project)** *means two or more businesses joining together under a contractual agreement to conduct a specific business enterprise with both parties sharing profit and losses. The venture is for one specific project only, rather than for a continuing business relationship as in a strategic alliance. It is about sharing risk with others and providing one or more missing and needed assets and competencies.*
- 3.19 **“Management”** - *in relation to an enterprise or business, means an activity inclusive of control, and performed on a daily basis, by any person who is a principal executive officer of the company, by whatever name that person may be designated, and whether or not that person is a director.*
- 3.20 **“Non-firm Price(s)”** - *means all price(s) other than “firm” price(s).*
- 3.21 **“Organ of State”** - *means a constitutional institution defined in the Public Finance Management Act, Act 1 of 1999.*
- 3.22 **“Person(s)”** - *refers to a natural and/or juristic person(s).*
- 3.23 **“Rand Value”** - *means the total estimated value of a contract in Rand denomination, which is calculated at the time of proposal invitations and includes all applicable taxes and excise duties.*
- 3.24 **“Successful Vendor”** - *means the organization or person with whom the order is placed or who is contracted to execute the work as detailed in the bid.*
- 3.25 **“Prime Vendor”** – *means any person (natural or juristic) who forwards an acceptable proposal in response to this RFB with the intention of being the main contractor should the proposal be awarded to him/her.*
- 3.26 **“Vendor Agent”** - *means any person mandated by a prime vendor or consortium/joint venture to do business for and on behalf of, or to represent in a business transaction, the prime vendor and thereby acquire rights for the prime vendor or consortium/joint venture against TETA or an organ of state and incur obligations binding the prime vendor or consortium/joint venture in favour of TETA or an organ of state.*
- 3.27 **“SMME”** – *bears the same meaning assigned to this expression in the National Small Business Act, 1996 (Act No. 102 of 1996).*
- 3.28 **“Service Partners”** - *means any successful vendor who is awarded the proposal or who entered into an agreement with TETA and/or its clients to offer consulting services in areas such as but not limited to, strategic e-business consulting, evaluation, implementation and continuous improvement or system integration.*

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- 3.29 **“Support Partners”** - means any successful vendor who entered into partnership agreement with TETA and/or its clients for the provision of support services to a specific solution.
- 3.30 **“Sub-Contracting”** - means the primary contractor’s assigning or leasing or making out work to, or employing another person to support such primary contractor in executing part of a project in terms of a contract.
- 3.31 **“Trust”** - means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person.
- 3.32 **“Trustee”** - means any person, including the founder of a trust, to whom property is bequeathed in order *for such property to be administered for the benefit of another person*.

4 GENERAL RULES AND INSTRUCTIONS

4.1 Confidentiality

- 4.1.1 The information contained in this document is of a confidential nature, and must only be used for purposes of responding to this RFB. This confidentiality clause extends to Bidder partners and/or implementation agents, whom the Bidder may decide to involve in preparing a response to this RFB.
- 4.1.2 For purposes of this process, the term “Confidential Information” shall include all technical and business information, including, without limiting the generality of the foregoing, all secret knowledge and information (including any and all financial, commercial, market, technical, functional and scientific information, and information relating to a party’s strategic objectives and planning and its past, present and future research and development), technical, functional and scientific requirements and specifications, data concerning business relationships, demonstrations, processes, machinery, know-how, architectural information, information contained in a party’s software and associated material and documentation, plans, designs and drawings and all material of whatever description, whether subject to or protected by copyright, patent or trademark, registered or un-registered, or otherwise disclosed or communicated before or after the date of this process.
- 4.1.3 The receiving party shall not, during the period of validity of this process, or at any time thereafter, use or disclose, directly or indirectly, the confidential information of TETA (even if received before the date of this process) to any person whether in the employment of the receiving party or not, who does not take part in the performance of this process.
- 4.1.4 The receiving party shall take all such steps as may be reasonably necessary to prevent TETA’s confidential information coming into the possession of unauthorised third parties. In protecting the receiving party’s confidential information, TETA shall use the same degree of care, which does not amount to less than a reasonable degree of care, to prevent the unauthorised use or disclosure of the confidential information as the receiving party uses to protect its own confidential information.
- 4.1.5 Any documentation, software or records relating to confidential information of TETA, which comes into the possession of the receiving party during the period of validity of this process or at any time thereafter or which has so come into its possession before the period of validity of this process:
- 4.1.5.1 shall be deemed to form part of the confidential information of TETA;
 - 4.1.5.2 shall be deemed to be the property of TETA;
 - 4.1.5.3 shall not be copied, reproduced, published or circulated by the receiving party unless and to the extent that such copying is necessary for the performance of this process and all other processes as contemplated in; and

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4.1.5.4 shall be surrendered to TETA on demand, and in any event on the termination of the investigations and negotiations, and the receiving party shall not retain any extracts.

4.2 Preferential Procurement Reform

4.2.1 TETA supports Black Economic Empowerment as an essential ingredient of its business. In accordance with government policy, TETA insists that the private sector demonstrates its commitment and track record to Black Economic Empowerment in the areas of ownership (shareholding), skills transfer, employment equity and procurement practices (SMME Development) etc.

4.2.2 TETA will apply the principles of the Preferential Procurement Policy Framework Act, (Act No. 5 of 2000) to this proposal.

4.2.3 Vendors shall submit the "Broad-Based Black Economic Empowerment Status Level Certificates" as part of this proposal. In the case of a consortium and sub-contractors, the preference certificate must be completed for each legal entity.

4.3 Language

4.3.1 Bids shall be submitted in **English**.

4.4 Gender

4.4.1 Any word implying any gender shall be interpreted to imply all other genders.

4.5 Formal contract

4.5.1 This RFB, all the appended documentation and the proposal in response thereto read together, forms the basis for a formal contract to be negotiated and finalised between TETA and the enterprise(s) to whom TETA awards the bid in whole or in part.

4.5.2 A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between TETA and any vendor.

4.6 Instructions for the submissions of a proposal

4.6.1 **ONE (1)** original copy and **ONE (1)** electronic (Virus Free USB) copy of the Bid shall be submitted on the date of closure of the Bid.

4.6.2 **NB: ONE (1) Pricing/ Costing schedule must be submitted in a separate sealed envelope together with the Standard Bidding Document SBD 3.3.**

A copy of the Pricing/Costing Schedule must be submitted in a separate Virus Free USB.

4.6.3 The original copy **MUST BE SIGNED** by an authorised employee, agent or representative of the bidder.

4.6.4 Bidders shall submit proposal responses in accordance with the prescribed manner of submissions as specified above.

4.6.5 Bids must be submitted in a prescribed response format herewith reflected as Response Format, and be sealed in an envelope.

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- 4.6.6 Bids must be deposited into the tender box at reception on or before **14 JUNE 2021** not later than 11h00.
- 4.6.7 All Bids in this regard shall only be accepted if they have been placed in the bid box before or on the closing date and stipulated time.
- 4.6.8 Bids received after the time stipulated will not be considered.
- 4.6.9 Bid responses sent by post or courier must reach this office at least 36 hours before the closing date to be deposited into the proposal box. Failure to comply with **par. 4.6.6** will result in your proposal being treated as a “late proposal” and will not be entertained. Such proposal will be returned to the respective vendors.
- 4.6.10 No proposal shall be accepted by TETA if submitted in any manner other than as prescribed above.

5 RESPONSE FORMAT (VERY IMPORTANT)

- 5.1 Vendors shall submit response in accordance with the response format specified below. Failure to do so will result in rejecting the vendor’s response. No referrals may be made to comment. Failure to comply will result in the vendor being penalised.
- 5.2 **Schedule Index:**
- 5.2.1 **Schedule 1:** Invitation to Bid – SDB 1 (pages 1-3) plus General information: Pages 4 – 15 of this RFB document
- 5.2.2 **Schedule 2** : Important conditions
- 5.2.3 **Schedule 3** : Bidding Commitment
- 5.2.4 **Schedule 4** : Terms of Reference
- 5.2.5 **Schedule 5** : General Conditions of Contract (GCC)
- 5.2.6 **Schedule 6** : Non-Collusion Form
- 5.2.7 **Schedule 7** : Company Profile
- 5.2.8 **Schedule 8** : **Technical Proposal**
- 5.2.9 **Schedule 9** : Academic Qualifications: **Lead Researcher**
- 5.2.10 **Schedule 10** : **Consent Letter** from a qualified **Statistician**
- 5.2.11 **Schedule 11** : **Lead Researcher’s Experience**
- 5.2.12 **Schedule 12** : Experience of the Company
- 5.2.13 **Schedule 13** : **Human Resource Capacity**
- 5.2.14 **Schedule 14** : Preference points claim forms (SBD6.1) and B-BBEE Certificate
- 5.2.15 **Schedule 15** : Tax Clearance Requirements
- 5.2.16 **Schedule 16** : Declaration of Interest (SBD4)
- 5.2.17 **Schedule 17** : Declaration of the Bidder’s past SCM practices (SBD8)
- 5.2.18 **Schedule 18** : Certificate of Independent Bid Determination (SBD9)
- 5.2.19 **Schedule 19** : Pricing Schedule SBD 3.3 (Must be in the same envelope as the Costing Schedule – Schedule 20)
- 5.2.20 **Schedule 20** : Pricing / Costing Schedule – in a separate sealed envelope marked clearly with the bidder’s name and tender number and description. Electronic (USB) copy of the Pricing/Costing Schedule must be enclosed in this envelope.
- 5.2.21 **Schedule 21** : Research Proposal Evaluation Checklist (TETA Evaluation Checklist)
- 5.2.22 **Schedule 22** : Compliance Checklist of returnable documents by the Bidder

6 BID PREPARATION

- 6.1 All additions to the bid proposal documents, i.e. annexes, supporting documentation, pamphlets, photographs, technical specifications covering equipment and/or services to be offered, shall be neatly bound as part of the schedule concerned.
- 6.2 All responses with questions posed on this bid documents shall be answered in accordance with the Response Format of this RFB.

7 ORAL PRESENTATION AND BRIEFING SESSIONS

- 7.1 Bidders who submit bid offers in response to this RFB may be required to give oral presentations, which may include, but not limited to, an equipment / service demonstration of their proposal to TETA.
- 7.2 This provides an opportunity to the vendor to clarify or elaborate on the proposal.
- 7.3 No compulsory briefing session will be held due to COVID-19 regulations. Questions to be forwarded to this email address tenders@teta.org.za and Cut-off date for queries is **Wednesday, 09 June 2021** end of business day.

8 SPECIAL CONDITIONS OF CONTRACT/BID

Bidders shall provide full and accurate answers to all including mandatory questions posed in this document, and, are required to explicitly state either "Comply/Accept (with a √)" or "Do not comply/Do not accept (with an X)" regarding compliance to the requirements. Where necessary, the bidder shall substantiate their response to a specific question.

8.1

The laws of the Republic of South Africa shall govern this RFB and the bidders hereby accept that the courts of the Republic of South Africa shall have the jurisdiction.	Accept	Do not accept
Transport Education Training Authority		

8.2

TETA will not be liable for any costs incurred by the bidder in the preparation of response to this RFB. The preparation of response will be made without obligation to acquire any of the items included in any bidder's proposal or to select any proposal, or to discuss the reasons why such vendor's or any other proposal was accepted or rejected.	Accept	Do not accept
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8.3

TETA may request written clarification or further information	Accept	Do not accept
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regarding any aspect of this proposal. The bidders must supply the requested information in writing within twenty four (24) hours after the request has been made, otherwise the proposal may be disqualified.		

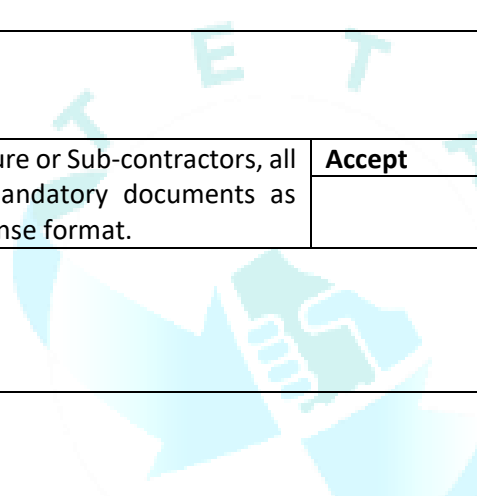
8.4

In the case of Consortium, Joint Venture or Sub-contractors, bidders are required to provide copies of signed agreements stipulating the work split and Rand value.	Accept	Do not accept

8.5

In the case of Consortium, Joint Venture or Sub-contractors, all bidders are required to provide mandatory documents as stipulated in schedule 1 of the Response format.	Accept	Do not accept

8.6

TETA reserves the right to cancel or reject any proposal and not to award the proposal to the lowest bidder or award parts of the proposal to different bidders, or not to award the proposal at all.	Accept	Do not accept
 <p style="font-size: 24px; color: #00A0C0; margin: 0;">Transport Education Training Authority</p> <hr style="border: 1px solid #00A0C0; margin: 5px 0;"/> <p style="font-size: 24px; color: #00A0C0; margin: 0;"><i>Driven by Vision</i></p>		

8.7

Where applicable, bidders who are distributors, resellers and installers of network equipment are required to submit back-to-back agreements and service level agreements with their principals.	Accept	Do not accept

8.8

By submitting a proposal in response to this RFB, the bidders accept the evaluation criteria as it stands.	Accept	Do not accept

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8.9

Where applicable, TETA reserves the right to run benchmarks on equipment during the evaluation and after the evaluation.	Accept	Do not accept

8.10

TETA reserves the right to conduct a pre-award survey during the source selection process to evaluate contractors' capabilities to meet the requirements specified in the RFB and supporting documents.	Accept	Do not accept

8.11

Only the solution commercially available at the proposal closing date will be considered. No Bids for future solutions will be accepted.	Accept	Do not accept

8.12

The bidder should not qualify the proposal with own conditions. Caution: If the bidder does not specifically withdraw its own conditions of proposal when called upon to do so, the proposal response will be declared invalid.	Accept	Do not accept

8.13

Should the bidder withdraw the proposal before the proposal validity period expires, TETA reserves the right to recover any additional expense incurred by TETA having to accept any less favourable proposal or the additional expenditure incurred by TETA in the preparation of a new RFB and by the subsequent acceptance of any less favourable proposal.	Accept	Do not accept

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8.14

Delivery of and acceptance of correspondence between TETA and the bidder sent by prepaid registered post (by air mail if appropriate) in a correctly addressed envelope to either party's postal address or address for service of legal documents will be deemed to have been received and accepted after (2) two days from the date of postage to the South African Post Office Ltd.	Accept	Do not accept

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8.15

Should the parties at any time before and or after the award of the proposal and prior to, and or after conclusion of the contract fail to agree on any significant product price or service price adjustments, change in technical specification, change in services, etc. TETA shall be entitled within 14 (fourteen) days of such failure to agree, to recall the letter of award and cancel the proposal by giving the bidder not less than 90 (ninety) days written notice of such cancellation, in which event all fees on which the parties failed to agree increases or decreases shall, for the duration of such notice period, remain fixed on those fee/price applicable prior to the negotiations. Such cancellation shall mean that TETA reserves the right to award the same proposal to next best bidders as it deems fit.	Accept	Do not accept



8.16

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In the case of a consortium or JV each of the authorised enterprise's members and/or partners of the different enterprises must co-sign this document.	Accept	Do not accept

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8.17

Any amendment or change of any nature made to this RFB shall only be of force and effect if it is in writing, signed by TETA signatory and added to this RFB as an addendum.	Accept	Do not accept

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8.18

Failure or neglect by either party to (at any time) enforce any of the provisions of this proposal shall not, in any manner, be construed to be a waiver of any of that party's right in that regard and in terms of this proposal. Such failure or neglect shall not, in any manner, affect the continued, unaltered validity of this proposal, or prejudice the right of that party to institute subsequent action.	Accept	Do not accept

8.19

Bidders who make use of sub-contractors. The proposal will however be awarded to the Vendor as a primary contractor who will be responsible for the management of the awarded proposal. No separate contract will be entered into between TETA and any such Sub-contractors. Copies of the signed agreements between the relevant parties must be attached to the proposal responses.	Accept	Do not accept

8.20

All services supplied in accordance with this proposal must be certified to all legal requirements as per the South African law.	Accept	Do not accept

8.21

No interest shall be payable on accounts due to the successful vendor in an event of a dispute arising on any stipulation in the contract.	Accept	Do not accept

8.22

Evaluation of Bids will be performed by an evaluation panel	Accept	Do not accept
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Request for Bid

<p>established by TETA.</p> <p>Bids will be evaluated on the basis of conformance to the required specifications as outlined in the RFB. Points will be allocated to each bidder, on the basis that the maximum number of points that may be scored for functionality (may be between 50 and 100) and points for price is 80, as per National Treasury Instruction dated 15/09/2010, and the maximum number of preference points that may be claimed for BEE (as per PPPFA) is 20.</p>		

8.23

<p>TETA will not be held liable for any expenses incurred by vendors, in preparing and submitting the proposal.</p>	Accept	Do not accept

8.24

<p>If the successful bidder disregards contractual specifications, this action may result in the termination of the contract.</p>	Accept	Do not accept

8.25

<p>The bidders' response to this BID, or parts of the response, will be included as a whole or by reference in the final contract.</p>	Accept	Do not accept

8.26

<p>Should the evaluation of this bid not be completed within the validity period of the bid, TETA has discretion to extend the validity period.</p>	Accept	Do not accept

8.27

<p>Upon receipt of the request to extend the validity period of the bid, the bidder must respond within the required time frames and in writing on whether or not he agrees to hold his original bid response valid under the same terms and conditions for a further period.</p>	Accept	Do not accept

SCHEDULE 2

IMPORTANT CONDITIONS

1. The bid forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional particulars shall be furnished on the enclosed questionnaire or in a separate annexure.
2. The bid forms should not be retyped or redrafted. Offers made in any other manner may be disregarded.
3. Should bid forms not be filled in by means of mechanical devices, for example typewriters, **ink, preferably black, must be used to fill in bid forms.**
4. Bidders shall check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability shall be accepted in regard to claims arising from the fact that pages are missing or duplicated.
5. In terms of the General Conditions of Contract and Order, firm bid prices and delivery periods are preferred. Consequently bidders shall clearly state whether or not prices will remain firm for the duration of the contract.
6. If non-firm prices are bided, the General Conditions of Contract and Order shall apply.
7. The bid prices shall be given in the units shown on the cost breakdown in the Pricing Schedule.
8. All prices shall be quoted in South African Currency and VAT inclusive.
9. Unless specifically provided for in the bid document, no bids transmitted by telegram, telex, facsimile, e-mail or similar apparatus shall be considered.
10. If a Consortium or Joint Venture or Sub-contractor, a **SARS PIN / CSD Supplier Number** must be submitted for each member.
11. Entities bidding as a consortium or joint venture must clearly indicate percentage participation that each entity is contributing to this bid. A signed Joint Venture Agreement must accompany the submission.
12. TETA reserve the right not to appoint any bidder for this bid.
13. The service providers must address each of the requirements as stated in the KEY DELIVERABLES and must be able to provide the stated outputs.
14. TETA will not be liable for any cost incurred in the preparation of the service providers' proposal.
15. All information provided by TETA is strictly confidential.
16. Service providers are not allowed to discuss or make any information available to any members of the public, press, other bidders or any other unauthorized person(s) except as authorized by CEO of TETA or her delegate.
17. Any false declaration of information will result in the exclusion of the appointment as service providers for TETA.
18. TETA reserves the right to discontinue the work at any given time in consultation with the service provider.

THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF THE CONTRACT AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. (REFER TO SCHEDULE 5 FOR GCC AND SCHEDULE 1 FOR SCC)

THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO MAY RESULT IN YOUR BID/PROPOSAL BEING DISQUALIFIED)

COMPANY NAME

POSTAL ADDRESS

STREET ADDRESS

TELEPHONE ()NUMBER.....

CELLPHONE NUMBER

FACSIMILE ()NUMBER.....

VAT REGISTRATION NUMBER

HAS A TAX CLEARANCE CERTIFICATE BEEN SUBMITTED (SBD 2)? YES/NO

PROOF OF SHAREHOLDINGS IN THE COMPANY CIPC DOCUMENTS (CoR 39.)

YES/NO

..... (IF YES ENCLOSE PROOF)



Transport Education Training Authority

Driven by Vision

SCHEDULE 3

BIDDING COMMITMENT

1. I / We hereby bid to supply all or any of the supplies and/or to render all or any of the services described in the attached documents to the Government of the Republic of South Africa on the terms and conditions and in accordance with the specifications stipulated in the bid documents (and which shall be taken as part of, and incorporated into, this bid) at the prices and on the terms regarding time for delivery and/or execution inserted therein.

2. I / We agree that –
 - (a) the offer herein shall remain binding upon me/us and open for acceptance by the Department during the validity period indicated and calculated from the closing time of the bid;
 - (b) this bid and its acceptance shall be subject to the terms and conditions contained in the General Conditions of Bid, Contract and Order with which I am/we are fully acquainted;
 - (c) the state may, without prejudice to its other rights, agree to the withdrawal of my/our bid, or cancel the contract that may have been entered into between me/us and the state if:
 - (i) I / we withdraw my/our bid within the period for which I/we have agreed that the bid shall remain open for acceptance
 - (j) fail to fulfil the contract when called upon to do so;
 - (d) Should additional expenses occur by reason of my / our default, the state shall also have the right to recover such additional expenditure by set-off against moneys which may be due to me/us under this or any other bid or contract or against any guarantee or deposit that may have been furnished by me/us or on my/our behalf for the due fulfilment of this or any other contract;
 - (e) If my / our bid is accepted the acceptance may be communicated to me/us by registered post and the **SA Post Office Ltd** shall be regarded as my / our agent, and delivery of such acceptance to **SA Post Office Ltd** shall be treated as delivery to me/us; and
 - (f) The law of the Republic of South Africa shall govern the contract created by the acceptance of my/our bid and that I/we choose a physical (street) address in the Republic (full address of this place)
.....
.....

3. I / We furthermore confirm that
 - I / we have satisfied myself/ourselves as to the correctness and validity of my/our bid;
 - that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid documents;
 - that the price(s) and rate(s) cover all my/our obligations under a resulting contract and
 - that I/we accept that any mistakes regarding price(s) and calculations will be at my/our risk

4. I / We hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me/us under the agreement as the Principal(s) liable for the due fulfilment of this contract.
5. I / We agree that any action arising from this contract may in all respects be instituted against me/us and I/we hereby undertake to satisfy fully any sentence or judgement which may be pronounced against me/us as a result of such action.
6. I / We declare that I/we have not been involved in negotiations with any person or company for the purpose of influencing the bid price(s) of the supplies/services described in the attached documents.
7. Are you duly authorised to sign the bid? *YES / NO
8. Has the Declaration of Interest been Completed and included with the other bid forms? *YES / NO

* Delete whichever is not applicable

Note: Failure on the part of a bidder to sign this form (BID COMMITMENT) and thus to acknowledge and accept the conditions in writing or to complete the attached forms, questionnaires and specifications in all respects, may invalidate the bid.

SIGNATURE(S) OF BIDDER OR ASSIGNEE(S)
.....DATE.....

<u>Please complete the following in block letters</u>	
Capacity and particulars of the authority under which this bid is signed:	
Name of Bidder	
Postal Address	
Telephone numbers (Toll free if Applicable)	
Facsimile number (s) / Fax number	
Bid number	
Name of contact person	

SCHEDULE 4

SPECIFICATION GOODS AND SERVICES REQUIRED / TERMS OF REFERENCE

1. THE BACKGROUND AND CONTEXT

The Transport Education and Training Authority (TETA) was established in terms of the Skills Development Act 97 of 1998, as amended. TETA is responsible for education and skills development in the transport sector to ensure the supply of relevant skills in the sector. One of TETA's primary functions is to develop a Sector Skills Plan (SSP) which is a guiding document for skills development and planning in the transport sector. The SSP informs the skills development interventions to respond to the demand in the labour market of the transport sector. The skills development interventions are offered through a range of learning programmes/qualifications at Post School Education and Training (PSET) Institutions. It is therefore important that everyone has equal access to the PSET institutions and obtain necessary skills that will improve their employability and ensuring that the skills supply meets the demand in the transport sector.

In terms of Section 29(1) of the Constitution of the Republic of South Africa Act, 1996 (Act No. 108 of 1996) everyone has the right (a) to a basic education, including adult education; and (b) to further education, in which the state, through reasonable measures, must make progressively available and accessible. However, some young people have been discouraged with the labour market and they are also not building on their skills base through education and training. The Quarterly Labour Force Survey (QLFS), Quarter 4 of 2020, reported that there were about 10,3 million young people aged 15 – 24 years of which 29,8% were not in employment, education, or training (NEET). This can be attributed to several reasons including lack of funds to access PSET institutions; lack of available education and training programmes; education and training programmes that are not suitable or unwillingness of poor information about available training and education programmes.

The Statistics on Post-School Education and Training in South Africa, 2019 report, states that over 1.2 million students enrolled in public and private HEIs in 2019 with the majority of the enrolments in the public HEIs (1 074 912) while private HEIs enrolled 208 978 students. The report further records a decline of number of graduates in public HEIs in 2019 (by 2.3%) compared to 2018. The graduation rate of private HEIs showed an increase of 25.2% from 2018 to 2019. This shows that learners are more likely to gain access to public HEIs than private HEIs with a decreasing graduation rate. There is evidence that South Africa has inequalities in access and success of PSET institutions.

2. CURRENT STATE OF AFFAIRS AND PROBLEM STATEMENT

The 2016 #FeesMustFall movement shined a light on the inequalities in access and success in post-school education and education in South Africa. The Department of Higher Education and Training mentions that increasing access to education and training is crucial as a means of reducing labour market inequality. Even more importantly, the department further mentions that this requires that the post-school education and training sector should ensure that the provision of education and training is of high quality, and improves learners'/trainees' skills for the workplace, in order to ensure increased productivity and income of both employed workers and the self-employed.

The South African government argues that given the high levels of inequality and poverty in South

Africa, most of which is the result of inequalities in the labour market, it is then imperative to increase access to skills that are valued in industries in the labour market and the broader economy (DHET, 2018). Furthermore, research shows that access to post-school education and training in South Africa remains not only low but also inequitable because large segments of the population being excluded from such higher education and training opportunities. This is exacerbated by the fact that the public higher education and training system is characterised by persistently low levels of throughput (i.e. graduation/completion rates) and high levels of dropout (van Broekhuizen, 2016).

It is therefore important to identify factors that hinder learners from accessing PSET institutions and reasons for low graduation rates to improve on the provision of skills that will benefit learners in being employable, reducing inequality and poverty and ensuring growth in the transport sector.

2.1 Data Sources

The study can follow either a qualitative study or both qualitative and quantitative based on the methodology that the researcher will propose. If it will be more qualitative the PSET institutions, PSET institutions that TETA has partnerships with, as well as TETA adopted schools will be the data sources. The service provider will solicit information on factors that hinder success in PSET from learners in our databases as well as PSET institutions.

3. PURPOSE

The study aims to identify factors that hinder access and success in PSET institutions and assessing the implications of skills demand and supply skills in the transport sector. This will ensure that everyone has equal access to education and training to obtain skills that will afford them employability and contribution to the economic growth of the transport sector.

Specifically, the study will;

- 3.1 Establish reasons learners/young people (aged 15 – 24 years) are not in employment or education and training;
- 3.2 Identify the factors that prevent learners from accessing PSET institutions;
- 3.3 Identify factors that play a role in learners' low graduation rates or dropout rates at PSET institutions;
- 3.4 Assess the impact of low levels of throughput on skills demand and supply in the Transport sector;
- 3.5 Provide information and recommendations on how to ensure that learners have equal access to post school education and training; and complete their studies.

4. TETA OBJECTIVES OF THIS STUDY

The overall objectives of this research study are:

- 4.1 To identify the factors that hinder learners to access post school education and training. This study will provide insight on areas of improvement for the government and PSET institutions to ensure equality with access to post school education and training across all social groups.

- 4.2 To identify factors that contribute to learners' low graduation rates. This will assist learners to complete their studies, acquire relevant skills that will make them employable and eliminate inequality and poverty. This will also ensure that the transport sector has a competent workforce.
- 4.3 To assess the impact lack of access and success in post school education and training on skills demand and supply of the transport sector.

5. SPECIFIC RESEARCH QUESTIONS

The research study seeks to answer the following specific questions (not exhaustive):

- 5.1. What are the factors that hinder learners to access post school education and training institutions?
- 5.2. What are the challenges experienced by learners and PSET institutions in ensuring that learners complete their studies and are employable in the transport sector?
- 5.3. How is the demand and supply of skills in the transport sector affected by the low graduation rates and lack of access to the PSET institutions?

6. EXPECTED OUTCOMES

TETA requires the following outputs as a measure of quality work:

- 6.1 Research proposal (see section 7 below for the structure of the research proposal);
- 6.2 Upon signing the contract produce an inception report detailing the research design (including data collection methods, sampling method, data collection tools and data analysis plan);
- 6.3 Review of relevant literature report/s not older than 5 years;
- 6.4 Monthly Progress reports;
- 6.5 Data Collection Instruments;
- 6.6 Raw data and analysed data set, completion rate and throughput rate;
- 6.7 Approved final research report by TETA (two bound hard copies, PDF electronic copy); and
- 6.8 A PowerPoint presentation (abstract and summary of the methodology, findings and recommendations).

7. SERVICE PROVIDER PROPOSAL REQUIREMENTS

The service provider shall submit research proposal that covers the following areas:

- 7.1 **Introduction** (introduce the research theme properly and give an overview of the study)
- 7.2 **Research background** (a brief outline on the studies that have been conducted so far on factors that influence access and success of post school education and training and implications on demand and supply of skills in the transport sector)
- 7.3 **Statement of the research problem** (explain the area of concern and emphasizing on the impact of the lack of access and success in post school education and training on skills demand and supply of the transport sector)
- 7.4 **Key research questions** (Outline the key questions that will be answered by the target population or sample to achieve the objective of the study.)
- 7.5 **Significance of the study** (indicate what is the main significance of the study)
- 7.6 **Literature review** (Explain how the literature review will set the concept of understanding the factors that hinders access and success in post school education and

training and implications thereof on demand and supply of skills in the transport sector (Secondary data)).

- 7.7 **Methodology** (explain the background of the method of approach, procedure, or techniques to be used to collect, select, process, and analyse data for this research study)
- 7.8 **Report outline** (outline how the project is to be reported)
- 7.9 **Quality of the project execution plan proposed** (explain the Project Execution Plan (PEP) report using excel spread sheet and time frames in the appendix)
- 7.10 **Risk analysis** (list all anticipated project-related risks and mitigating strategies thereof)

8. QUALIFICATIONS AND EXPERTISE REQUIRED

The Service provider must provide TETA with the Lead Researcher with the following qualification and experience:

- 8.1 Minimum of a Master's degree in Social Sciences, e.g. Education, Economics and Statistics or any related discipline;
- 8.2 Minimum of at least 3 completed and published research studies in Social Sciences, e.g. Education, Economics and Statistics or any other related discipline not older than 5 years;
- 8.3 Knowledge and experience in skills development programmes; and
- 8.4 Excellent communication and report writing skills.

9. EVALUATION CRITERIA

This bid will be evaluated in four (4) stages as follows:

Stage 1 - Pre-Compliance (Administrative Compliance) Evaluation

Stage 2 - Definitely Non Negotiable (DNN)

Stage 3 - Functionality Evaluation

Stage 4 - Price and B-BBEE Evaluation

9.1 PRE-COMPLIANCE EVALUATION - (STAGE 1)

After the receipt of bids, Supply Chain Management Unit will conduct administrative compliance of bid submissions based on the following mandatory and non-mandatory requirements:

9.1.1 Mandatory Requirements

Bidders who fail to meet the following mandatory requirements will be disqualified at Pre-Compliance Phase:

Criterion	Requirement
Invitation to bid (SBD 1)	<ul style="list-style-type: none">• The form must be completed and signed.

Criterion	Requirement
Bid submission	<ul style="list-style-type: none"> • Bid documents must be completed in full and all declarations of interest signed (For JV or consortium all declarations must be signed by both parties. • Only one (1) original copy must be submitted, signed by an authorised representative (s). • Over and above the original submission copy, the bidder is required to submit a soft copy of the submission (Technical Proposal) in a virus free Memory Stick. • NB. All pricing related information must be submitted in a separate virus free Memory stick. • NB. Failure to submit Price information separately from the Technical Proposal will disqualify the bid.
Declaration of Interest (SBD 4)	<ul style="list-style-type: none"> • The bidder must fully complete and sign the Declaration of interest form. <p>For JV or consortium all parties must complete and sign this declaration, per company.</p>
Declaration of the bidder's past SCM practices (SBD 8)	<ul style="list-style-type: none"> • The bidder must fully complete and sign the SBD 8 form. <p>For JV or consortium all parties must complete and sign this declaration, per company.</p>
Certificate of Independent Bid Determination (SBD 9)	<ul style="list-style-type: none"> • The bidder must complete and sign the SBD 9 form. <p>For JV or consortium all parties must complete and sign this declaration, per company.</p>
SARS Pin / CSD Supplier Number	<ul style="list-style-type: none"> • The bidder must submit a SARS Pin with expiry date to assist with verification of Tax Affairs. • If SARS Pin is not submitted provide CSD Supplier Number <p>In a case of a JV, all companies' Tax Clearance Certificates or SARS pins must be submitted</p>
Proposal submission	<ul style="list-style-type: none"> • This is a Two-Envelope System for the technical proposal and pricing proposal
Briefing Session	<ul style="list-style-type: none"> • There will be no briefing session due to Covid-19 regulations. Time will be allocated for Questions and Answers to bidders.

Criterion	Requirement
CIPC Documents	<ul style="list-style-type: none"> The bidder must provide certified copies of Company / Close corporation registration certificates issued by CIPC. Bidders must confirm their company registration with CIPC as TETA will not award any tender to any business that appears on the CIPC List of de-registered businesses.
Joint Venture Agreement	<ul style="list-style-type: none"> In a case of a JV, a JV Agreement must be submitted and signed by all parties.
Central Supplier Database Registration	<ul style="list-style-type: none"> The bidder must be registered as a supplier with Treasury on www.csd.gov.za. (Please attach proof)

9.1.2 Administrative Requirements

As part of the administrative compliance evaluation, the bidder must also furnish the following documents:

Criterion	Requirement
B-BBEE Certificate	<ul style="list-style-type: none"> Preference Points Schedule (B-BBEE) form SBD 6.1 must be completed and signed. A certified copy of the B-BBEE Certificate must be submitted (not a certified copy of a copy). Submit a valid BBBEE Verification Certificate from SANAS Accredited Verification Agency / Registered Auditor approved by IRBA. The Qualifying Small Enterprise (QSE) and Exempted Micro Enterprises (EME) must submit a sworn affidavit stamped and signed by the Commissioner of Oath confirming the Company Annual Total Revenue and level of black ownership. Failure to submit a valid B-BBEE Certificate will result in a bidder losing preference points. In a case of a JV, a combined B-BBEE Certificate must be submitted together with a JV Agreement signed by all parties
Qualifications or Certificates of Lead Researcher and Research Team	<ul style="list-style-type: none"> Attach certified copies of qualifications and CV of the Lead Researcher and the Research Team. <p>NB. Provide certified copies of the qualification certificates. Uncertified Qualifications certificates will not be accepted as authentic.</p>

Criterion	Requirement
Consent Letter from a Qualified Statistician	<ul style="list-style-type: none"> The Service Provider must provide TETA with a signed Consent Letter from a qualified Statistician.
Identity Documents of Directors/Owners or List of Directors	<ul style="list-style-type: none"> Certified copies of Directors/Owners Identity Documents <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> List of directors
Soft copy of the bid submission	<ul style="list-style-type: none"> Over and above the original submission copy, the bidder is required to submit a soft copy of the submission (Technical Proposal) in a virus free Memory Stick. All pricing related information must be submitted in a separate virus free Memory stick.
Banking Details	<ul style="list-style-type: none"> Signed and bank stamped banking details
Company Profile including HDI status	<ul style="list-style-type: none"> The bidder is required to provide company background information materials / Company Profile
General Conditions of Contract/Bid	<ul style="list-style-type: none"> The bidder must accept General Conditions of Contract / Bid and provide full and accurate answers posed in this section.
Letter of Authority of Signatory	<ul style="list-style-type: none"> The bidder is required to provide a Letter of Authority of Signatory to sign the bid submission, signed and in the company's Letter Head.

9.2 DEFINITELY NON-NEGOTIABLE (DNN) – (STAGE 2)

All bidders who have passed Pre-compliance evaluation will be further evaluated on the DNN according to the criteria below:

Criterion	Requirement
Lead Researcher Qualifications	<p>The Service Provider must provide TETA with a Lead Researcher with the minimum qualification of a Masters' in Social Sciences, e.g. Education, Economics and Statistics or any related discipline.</p> <p>NB. Attach certified copies of qualifications and CV of the Lead Researcher. Uncertified qualification certificates will not be accepted as authentic.</p> <p>NB. The service Provider must submit a signed Consent Letter by the Lead Researcher</p>

Experience of a Lead Researcher in similar assignments	<p>The Lead Researcher must at least have led and completed 3 research studies in Social Sciences, e.g. Education, Economics and Statistics or any related discipline, not older than 5 years.</p> <p>NB. Experience should be in a table format with contactable references, for example: Name of Institution. Title of the study, year conducted, year completed, purpose of the study, contactable reference name and contact details.</p> <p>NB. Complete the respective Schedule of the FRB document</p>
Minimum number of Lead Researcher References in similar assignments	<p>In terms of the above Experience Schedule the Lead Researcher must submit a minimum of three (3) contactable references according to the 3 studies conducted.</p>
Audited Annual financial statements	<p>The Service Provider must submit latest 2 years (2019 and 2020) audited financial statement to demonstrate capacity to deliver on the project.</p> <p>IF SUBMITTED AFS ARE NOT AUDITED, THE SERVICE PROVIDER MUST EXPLAIN IN A SEPARATE LETTER WHY THEY ARE NOT AUDITED.</p>
Human Resource Capacity	<p>The Service Provider must provide a list of dedicated key personnel, other than the Lead Researcher, to be involved in this project including their positions in the company and CV (detailing their qualifications and experience).</p> <p>NB. Please provide certified copies of the qualification certificates (not copies of certified copies)</p>

NB: All bidders who pass the Pre-Compliance Evaluation will be further evaluated on Functionality.

9.3 FUNCTIONALITY EVALUATION – (STAGE 3)

TETA applies the provisions of the **Preferential Procurement Policy Framework Act**, (Act no. 5 of 2000), the **Preferential Procurement Regulations of 2017** and **National Treasury Instruction dated 3 September 2010** where functionality is used as a criterion.

The scores will be allocated according to the following EVALUATION MATRIX for assessment of bids:

Values: 1 = Poor 2 = Average 3 = Good 4 = Very Good 5 = Excellent

NB. In addition, criterion 4 (Research Proposal) of the functionality below will be evaluated using a TETA developed Evaluation Checklist.

A bidder must obtain a minimum of **70 points** on functionality phase in order to advance to

the next phase of evaluation on Price and B-BBEE.

The following functionality criteria apply to this bid:

Item No	FUNCTIONALITY EVALUATION:	Weighting
1	<p><u>Qualifications of Lead Researcher:</u> Masters degree in Social Sciences, e.g. Education, Economics and Statistics or any related discipline.</p> <p>NB. Attach certified copies of qualifications and CV of the Lead Researcher. Uncertified qualification certificates will not be accepted as authentic.</p> <ul style="list-style-type: none"> ○ PHD - Excellent (5) ○ Masters - very Good (4) 	15
2	<p><u>Experience – Lead Researcher:</u> Must at least have led and completed three (3) research studies in Social Sciences, e.g. Education, Economics and Statistics or any related discipline.</p> <ul style="list-style-type: none"> ○ 5 or more studies completed - Excellent (5) ○ 4 studies completed - Very Good (4) ○ 3 study completed - Good (3) <p>NB. Experience should be in a table format with contactable references, for example: Name of Institution. Title of the study, year conducted, year completed, purpose of the study, contactable reference name and contact details.</p> <p>NB. Complete the respective Schedule of the FRB document</p>	15
3	<p><u>Lead Researcher References:</u> Must submit minimum of three (3) contactable reference in line with the 3 studies conducted.</p> <ul style="list-style-type: none"> ○ 5 or more references (5 studies or more) - Excellent (5) ○ 4 references (4 studies) - Very Good (4) ○ 3 references (3 studies) - Good (3) <p>NB. In terms of the above Experience Schedule the Lead Researcher must submit a minimum of three (3) contactable references according to the 3 studies conducted</p>	10

Item No	FUNCTIONALITY EVALUATION:	Weighting
4	<p><u>Research Proposal:</u></p> <p>The bidder must provide a detailed research proposal in line with paragraph 7 talking to the following framework:</p> <ul style="list-style-type: none"> 4.1 Introduction 4.2 Research background 4.3 Statement of the research problem 4.4 Key research questions 4.5 Significance of the study 4.6 Literature review 4.7 Methodology (In the methodology section the service provider should describe the actions to be taken to investigate the <i>research</i> problem and the rationale for the application of specific procedures or techniques to be used to identify, select, process, and analyze information applied to understanding the impact of trainings in the transport sector, allowing the reader to critically evaluate if the impact issues will be properly unpacked in the study). 4.8 Report outline 4.9 Quality of the project execution plan proposed 4.10 Risk analysis 4.11 Conclusion 4.12 References 	50
5	<p><u>Financial Resources (organisational liquidity and AFS)</u></p> <p>Must demonstrate financial capacity to rollout the programme: submit latest 2 years audited financial statement to demonstrate capacity to deliver on the project (2019 & 2020).</p> <ul style="list-style-type: none"> - Acid test ratio of 1 or more – Excellent (5) - Acid test ratio of less than 1 – Poor (1) 	10
	Total	100

9.4 PRICE AND B-BBEE EVALUATION CRITERIA (STAGE 4)

9.4.1 Price Evaluation

TETA applies the provisions of the **Preferential Procurement Policy Framework Act, (Act no.5 of 2000)**, the **Preferential Procurement Regulations of 2017** and **National Treasury Instruction dated 3 September 2010** where functionality is used as the criteria.

Preferential points will be allocated using 80/20 as follows: Criteria	Points
Price	80
B-BBEE status of level contributor	20
Total	100

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of tender under consideration

P_t = Rand value of tender under consideration

P_{min} = Price of lowest acceptable tender

9.4.2 B-BBEE Evaluation

The following Table will be used to allocate the scores as this is an 80/20 bid:

B-BBEE Status Level of Contributor	Number of Points (80/20)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

NB: The bid will be awarded to a bidder who scores the total highest points on Price and B-BBEE unless there is a compelling reason not to award the bid to the highest point scorer.

10. DURATION OF THE PROJECT

The project is expected to be complete in **six (6) months**.

11. QUALITY ASSURANCE REVIEWS OF THE WORK

Quality Assurance of the assignment provided in a form of regularly reporting to the TETA Research and Knowledge Unit, adhering to scheduled timeframes.

12. MONITORING PROGRESS OF ASSIGNMENTS

TETA shall monitor and evaluate the progress of the project through deliverables on an ongoing basis.

13. PROJECT MANAGEMENT

Process	Description
Time Management	<ul style="list-style-type: none"> The project timelines will be regularly monitored
Cost Management	<ul style="list-style-type: none"> The monthly report in an agreed format will record expenses on this project, for project disbursement portion
Quality Management	<ul style="list-style-type: none"> Quality assurance will be maintained through regular meetings via the TETA Project Owner

Process	Description
Change Management	<ul style="list-style-type: none"> Any changes within the project must be recorded using a prescribed Change Request Form and such approval would need to be authorised by the TETA Board No changes will be effected / implemented / actioned without the relevant prior approval
Issue Register	<ul style="list-style-type: none"> An issue is an adverse event that has occurred and has the potential of jeopardizing the success of the project. All issues will be documented using prescribed Issue Forms The details of each issue will be summarized in an Issue Register to enable the Project Owner to monitor and control the status of the Issues throughout the project.
Acceptance Management	<ul style="list-style-type: none"> The Project Owner will certify performance in terms of the contract
Report Management	<ul style="list-style-type: none"> The TETA Project Owner will meet once every month throughout the duration of the project to discuss: <ul style="list-style-type: none"> Progress to date Current risks and issues Any changes required to ensure project success TETA will be supplied with regular progress reports in the agreed format Monthly progress reports will be submitted by the 7th of each month or as and when the need arise

14. PRICING

- 14.1 A detailed cost breakdown structure must be included;
- 14.2 All other costs are to be listed and included under "other"; and
- 14.3 All pricing must be shown inclusive of any applicable VAT.

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SCHEDULE 5

GENERAL CONDITIONS OF CONTRACT (GCC)

NOTES

The purpose of this document is to:

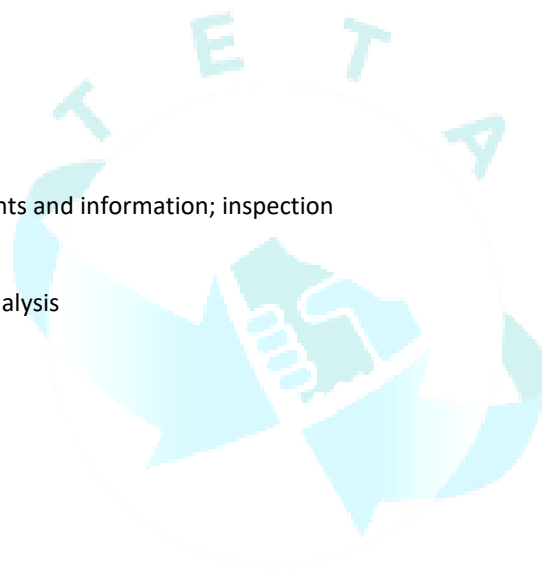
- (i) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (ii) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.

In this document words in the singular also mean in the plural and vice versa and words in the masculine also mean in the feminine and neuter.

- The General Conditions of Contract will form part of all bid documents and may not be amended.
- Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid (if applicable) and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

TABLE OF CLAUSES

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Support Education Training Authority

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GENERAL CONDITIONS OF CONTRACT

Definitions

1. The following terms shall be interpreted as indicated:
 - 1.1 "Closing time" means the date and hour specified in the bidding documents for the receipt of bids.
 - 1.2 "Contract" means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
 - 1.3 "Contract price" means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
 - 1.4 "Corrupt practice" means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.
 - 1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
 - 1.6 "Country of origin" means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
 - 1.7 "Day" means calendar day.
 - 1.8 "Delivery" means delivery in compliance of the conditions of the contract or order.
 - 1.9 "Delivery ex stock" means immediate delivery directly from stock actually on hand.
 - 1.10 "Delivery into consignees store or to his site" means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
 - 1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.
 - 1.12 "Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.
 - 1.13 "Fraudulent practice" means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.
 - 1.14 "GCC" means the General Conditions of Contract.
 - 1.15 "Goods" means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
 - 1.16 "Imported content" means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.
 - 1.17 "Local content" means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.
 - 1.18 "Manufacture" means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
 - 1.19 "Order" means an official written order issued for the supply of goods or works or the rendering of a service.
 - 1.20 "Project site," where applicable, means the place indicated in bidding documents.
 - 1.21 "Purchaser" means the organization purchasing the goods.
 - 1.22 "Republic" means the Republic of South Africa.
 - 1.23 "SCC" means the Special Conditions of Contract.
 - 1.24 "Services" means those functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such

obligations of the supplier covered under the contract.

1.25 "Written" or "in writing" means handwritten in ink or any form of electronic or mechanical writing.

2. Application

2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.

2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.

2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

3. General

3.1 Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.

3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from www.treasury.gov.za

4. Standards

4.1 The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.

5. Use of contract documents and information; inspection.

5.1 The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance.

5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.

5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.

5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

6. Patent rights

6.1 The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.

7. Performance security

7.1 Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in SCC.

7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.

7.3 The performance security shall be denominated in the currency of the contract, or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:

- a) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or

b) a cashier's or certified cheque

7.4 The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

8. Inspections, tests and analyses

8.1 All pre-bidding testing will be for the account of the bidder.

8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.

8.3 If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.

8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.

8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.

8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.

8.7 Any contract supplies may on or after delivery be inspected, tested or analysed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.

8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 23 of GCC.

9. Packing

9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

10. Delivery and documents

10.1 Delivery of the goods shall be made by the supplier in accordance with the terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified in SCC.

10.2 Documents to be submitted by the supplier are specified in SCC.

11. Insurance

11.1 The goods supplied under the contract shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified in the SCC.

12. Transportation

12.1 Should a price other than an all-inclusive delivered price be required, this shall be specified in the SCC.

13. Incidental services

13.1 The supplier may be required to provide any or all of the following services, including additional services, if any, specified in SCC:

- a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
- b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
- c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
- d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and
- e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

13.2 Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the parties and shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

14. Spare parts

14.1 As specified in SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

- a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and
- b) in the event of termination of production of the spare parts:
 - i. Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
 - ii. following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

15. Warranty

15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

15.2 This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.

15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

15.4 Upon receipt of such notice, the supplier shall, within the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the

purchaser.

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified in SCC, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

16. Payment

16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.

16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfilment of other obligations stipulated in the contract.

16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.

16.4 Payment will be made in Rand unless otherwise stipulated in SCC.

17. Prices

17.1 Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized in SCC or in the purchaser's request for bid validity extension, as the case may be.

18. Contract amendments

18.1 No variation in or modification of the terms of the contract shall be made except by written amendment signed by the parties concerned.

19. Assignment

19.1 The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.

20. Subcontracts

20.1 The supplier shall notify the purchaser in writing of all subcontracts awarded under this contract if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.

21. Delays in the supplier's performance

21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.

21.2 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.

21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.

21.4 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.

21.5 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.

21.6 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to

return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

22. Penalties

22.1 Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC Clause 23.

23. Termination for default

23.1 The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:

- a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
- b) if the Supplier fails to perform any other obligation(s) under the contract; or
- c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

23.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.

23.3 Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.

23.4 If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard the intended penalty as not objected against and may impose it on the supplier.

23.5 Any restriction imposed on any person by the Accounting Officer / Authority will, at the discretion of the Accounting Officer / Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the Accounting Officer / Authority actively associated.

23.6 If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:

- i. the name and address of the supplier and / or person restricted by the purchaser;
- ii. the date of commencement of the restriction
- iii. the period of restriction; and
- iv. the reasons for the restriction.

These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.

23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The

Register can be perused on the National Treasury website.

24. Anti-dumping and countervailing duties and rights

24.1 When, after the date of bid, provisional payments are required, or antidumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall on demand be paid forthwith by the contractor to the State or the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him

25. Force Majeure

25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

25.2 If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

26. Termination for insolvency

26.1 The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

27. Settlement of Disputes

27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.

27.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.

27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.

27.5 Notwithstanding any reference to mediation and/or court proceedings herein,
a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
b) the purchaser shall pay the supplier any monies due the supplier.

28. Limitation of liability

28.1 Except in cases of criminal negligence or wilful misconduct, and in the case of infringement pursuant to Clause 6;

a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and

- b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

29. Governing language

29.1 The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.

30. Applicable law

30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.

31. Notices

31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice

31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32. Taxes and duties

32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.

32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.

33. National Industrial Participation (NIP) Programme

33.1 The NIP Programme administered by the Department of Trade and Industry shall be applicable to all contracts that are subject to the NIP obligation.

34. Prohibition of Restrictive practices

34.1 In terms of section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder (s) is / are or a contractor(s) was / were involved in collusive bidding (or bid rigging).

34.2 If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in the restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

34.3 If a bidder(s) or contractor(s), has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder(s) or contractor(s) concerned.

SCHEDULE 6

NON-COLLUSION FORM

I, the undersigned

In my capacity as

_____ (insert Sole Owner, Partner, President, Secretary or other title)

of _____

(insert name of the tenderer).

acknowledge that on behalf of the above mentioned tenderer, I submit to TETA, a tender and that all statements of fact in such tender are both true and correct.

I further state that:

Such tender is not made in the interest of or on behalf of any undisclosed Person, Partnership, Company, Association, Organisation or Corporation.

Such tender is genuine and not collusive or a sham.

I have not directly or indirectly by agreement, communication or reference with anyone, attempted to induce action prejudicial to the interest of the TETA, or any other tenderer or anyone interested in the proposed contract.

Prior to the opening and reading out of prices,

- a. I did not, directly or indirectly, induce or solicit anyone else to submit a false or sham tender
- b. I did not, directly or indirectly, collude, conspire, connive or agree with anyone else that the said tenderer or anyone else would submit a false or sham tender, or that anyone should refrain from tendering or should withdraw his tender
- c. I did not, in any manner, directly or indirectly, seek by agreement, communication, or conference with anyone to raise or fix my tender price or for anyone else to raise or fix any overhead, profit or cost element of his tendered price.
- d. I did not directly or indirectly, submit this tender price or any breakdown thereof, or the contents thereof, or divulge information or data relative thereto, to any Corporation, Partnership, Company, Association, Organisation, Tender Depository, or to any member or agent thereof, or to any individual or group of individuals, except to the Parent Company holding a controlling interest (above 50%) in my business.

Dated at _____ on this the ____ day of _____ 20__

Signature of tenderer

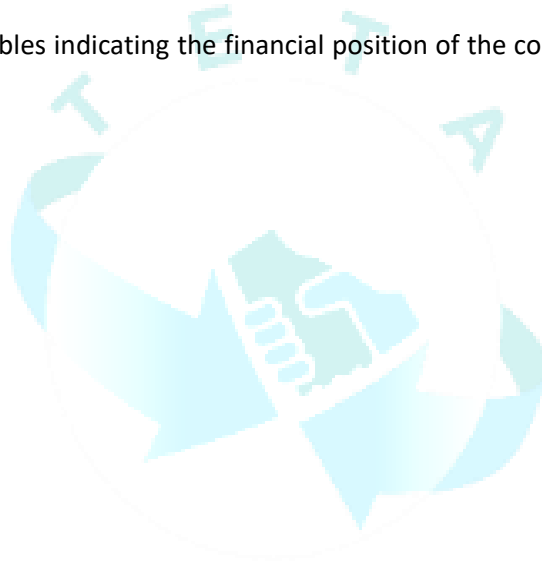
SCHEDULE 7

COMPANY PROFILE

The bidder's company profile must include but not limited to:

Bidder background information materials:

- **Bidder Operating Organisation** – Provide an overview of the operating structure and geographical locations of the firm at the national, regional, and local levels.
- **Standards** – Include information regarding your firm's utilization of widely known Industry Standards and guidelines, as they apply to your firm, your firm's proposal and proposed hardware assets.
- **Company Contact(s)** – Provide the name, title, street address, city, state, telephone and fax numbers and e-mail of the primary company's contact person, and for any sub-Contractors.
- **Financial Position** - Tables indicating the financial position of the company in the past three fiscal years.



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SCHEDULE 8

TECHNICAL PROPOSAL

The bidder's technical proposal must address the functionality areas in the Specification or Terms of Reference in **Schedule 4** including but not limited to:

- **ONE (1)** original copy and **ONE (1)** electronic (Virus Free USB) copy of the Bid shall be submitted on the date of closure of the Bid.
- The original copy **MUST BE SIGNED** by an authorised employee, agent or representative of the bidder



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SCHEDULE 9

LEAD RESEACHER QUALIFICATIONS

Lead Researcher with **Master's** degree in Social Sciences, e.g. Education, Economics and Statistics or any related discipline.

NB: Attach certified copies of qualifications and CV of the Lead Researcher. Uncertified qualification certificates will not be accepted as authentic.



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SCHEDULE 10

CONSENT LETTER FROM A QUALIFIED STATISTICIAN

The Service Provider must provide TETA with a signed Consent Letter from a qualified Statistician.



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SCHEDULE 11

LEAD RESEARCHER'S EXPERIENCE

NAME AND SURNAME OF NOMINATED LEAD RESEARCHER: _____ (Provide one resource)

TOTAL NUMBER OF YEARS OF EXPERIENCE IN SIMILAR ASSIGNMENTS: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1							
2							
3							
4							
5							
6							

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SCHEDULE 12

EXPERIENCE OF THE COMPANY IN SIMILAR ASSIGNMENTS

SERVICE PROVIDER'S NAME: _____ (Provide one resource)

TOTAL NUMBER OF YEARS OF EXPERIENCE IN SIMILAR ASSIGNMENTS: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1							
2							
3							
4							
5							
6							

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SCHEDULE 13

HUMAN RESOURCE CAPACITY

The Service Provider must provide a list of dedicated key personnel, other than the Lead Researcher, to be involved in this project including their positions in the company and CV (detailing their qualifications and experience).

NB. Please provide certified copies of the qualification or certificates (not copies of certified copies)



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SCHEDULE 14

PREFERENCE POINTS CLAIM FORMS (B-BBEE CERTIFICATE) – SBD 6.1

- Bidder must complete all sections of the SBD 6.1 in black ink and ensure that the form is signed by an authorised person
- The bidder must attach a certified copy of a valid B-BBEE Certificate issued by an accredited body
- If a consortium or Joint Venture a combined B-BBEE Certificate must be furnished
- A tenderer may not be awarded points if the tenderer indicates that the tenderer intends subcontracting more than 25% of the value of the contract to any other person not qualifying for at least the points that the tenderer qualifies for, unless the interned sub-contractor is an EME that has the capacity to execute the sub-contract

NB: Failure to provide the B-BBEE Certificate will lead to a bidder losing the preferential points.

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- 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 The value of this bid is estimated to not to exceed R50 000 000 (all applicable taxes included) and therefore the **80/20** system shall be applicable.

1.3 Preference points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contribution.

1.3.1 The maximum points for this bid are allocated as follows:

	POINTS
1.3.1.1 PRICE	80
1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION	20
Total points for Price and B-BBEE must not exceed	100

1.4 Failure on the part of a bidder to fill in and/or to sign this form and submit a B-BBEE

Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or an Accounting Officer as contemplated in the Close Corporation Act (CCA) together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

- 1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

- 2.1 **“all applicable taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;

- 2.2 **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad -Based Black Economic Empowerment Act;

- 2.3 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

- 2.4 **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;

- 2.5 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

- 2.6 **“comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;

- 2.7 **“consortium or joint venture”** 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;

- 2.8 **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;

- 2.9 **“EME”** means any enterprise with an annual total revenue of R5 million or less .

- 2.10 **“Firm price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;

- 2.11 **“functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;

- 2.12 **“non-firm prices”** means all prices other than “firm” prices;

- 2.13 **“person”** includes a juristic person;

- 2.14 **“rand value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.15 **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.16 **“total revenue”** bears the same meaning assigned to this expression in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the *Government Gazette* on 9 February 2007;
- 2.17 **“trust”** means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.18 **“trustee”** means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The bidder obtaining the highest number of total points will be awarded the contract.
- 3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;
- 3.3 Points scored must be rounded off to the nearest 2 decimal places.
- 3.4 In the event that two or more bids have scored equal total points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 3.5 However, when functionality is part of the evaluation process and two or more bids have scored equal points including equal preference points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 3.6 Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

4. POINTS AWARDED FOR PRICE

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

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

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

5. Points awarded for B-BBEE Status Level of Contribution

5.1 In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5.2 Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. **Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.**

5.3 Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.

5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that

such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

6. BID DECLARATION

6.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6.2 B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1

6.3 B-BBEE Status Level of Contribution:..... =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

7.1.1 If yes, indicate:

i. what percentage of the contract will be subcontracted?

.....%

ii. the name of the sub-contractor?

.....

iii. the B-BBEE status level of the sub-contractor?

.....

iv. whether the sub-contractor is an EME or QSE?

(Tick Applicable Box)

YES		NO	
-----	--	----	--

v. Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME	QSE
	√	√
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. **DECLARATION WITH REGARD TO COMPANY/FIRM**

8.1 Name of company/firm

8.2 AT registration number

8.3 Company registration number

8.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

8.6 COMPANY CLASSIFICATION

- Manufacturer
- Supplier
- Professional service provider

Other service providers, e.g. transporter, etc.
[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business?.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in paragraph 7 of the foregoing certificate, qualifies the company/firm for the preference(s) shown and I / we 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 paragraph 7, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv. If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding 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) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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

WITNESSES:

1.

2.

.....
SIGNATURE(S) OF BIDDER(S)

DATE:.....

ADDRESS:.....

.....
.....

SCHEDULE 15

TAX CLEARANCE CERTIFICATE REQUIREMENTS - National Treasury's SCM Instruction Note 9 of 2017/18

1. PURPOSE

1.1. The purpose of this Treasury Instruction is to provide guidance to accounting officers of departments and constitutional institutions and accounting authorities of public entities listed in Schedule 2 and 3 to the Public Finance Management Act (PFMA), Act No.1 of 1999 on the implementation of the revised South African Revenue Service (SARS) system for the management of tax compliance and the introduction of a revised Standard Bidding Document 1 (SBD 1) to give effect to the tax compliance status system.

2. BACKGROUND

2.1. Government is committed to increasing the degree of compliance with supply chain management prescripts and ensuring that persons conducting or intending to conduct business with the State have no scope to abuse the Supply Chain Management System.

2.2. It is therefore essential to ensure that persons conducting business with the State are tax compliant at the awarding of price quotations or competitive bids. No price quotations or competitive bids shall be awarded to businesses or persons who are not tax compliant.

2.3. On 18 April 2016, SARS introduced an enhanced tax compliance status system on eFiling aimed at improving tax compliance and making it easier for taxpayers to manage their tax affairs.

2.4. In terms of the legislative requirements, the new tax compliance status impacts on supply chain management processes and documentation as the South African Revenue Service has discontinued the issuance of tax clearance certificates.

2.5. National Treasury issued National Treasury SCM Instruction No. 7 of 2017/2018 wherein approved methods of verifying a bidder's tax compliance status was communicated. Subsequent to the issuance of the aforementioned Treasury Instruction, numerous queries were received from organs of state relating to the interpretation of the following issues:

- a) The process followed by SARS to confirm the tax compliance status of foreign bidders prior to award.
- b) What time period would be regarded as reasonable for the supplier to rectify their non-compliant status?
- c) Whether or not organs of State are required to verify if a directive has been issued by SARS regarding the withholding of payments to suppliers.

2.6. It therefore became necessary to review the National Treasury SCM Instruction No. 7 of 2017/2018 to amend the unclear provisions and to communicate the revised amendments on how SARS will be confirming the tax compliance status of foreign recommended bidders along with the implementation thereof.

3. Implementation of Tax Compliance Status System

3.1. In order to comply with the provisions indicated in paragraph 1 above and the condition that successful bidder's taxes must be in order, Accounting Officers and Accounting Authorities of all PFMA compliant institutions must:

- a) Designate officials, preferably from the Supply Chain Management Unit, whose function will be to verify the tax compliance status of a bidder on the South African Revenue Service's Tax Compliance Status system housed on eFiling. Guidance on the functionality of the Tax Compliance Status system on eFiling is available on the South African Revenue Service website: www.sars.gov.za.
- b) Utilise the SBD 1 issued with this Treasury Instruction when inviting bids;
- c) As a bid condition, Accounting Officers and Accounting Authorities must request bidders to register on Government's Central Supplier Database and to include in their bid their Master Registration Number (Supplier Number) in order to enable the institution to verify the supplier's tax status on Central Supplier Database;
- d) Utilise the tax compliance status Pin or the Central Supplier Database Master Registration Number (MAAA number) to verify the bidder's tax compliance status; and
- e) In the case of foreign recommended bidders, with neither South African tax obligation nor history of doing business in South Africa, the foreign recommended bidder's completed SBD 1 must be submitted to the South African Revenue Service to issue the Confirmation of Tax Obligations letter in terms of 3.6 below.

3.2. The Central Supplier Database and the tax compliance status PIN are the approved methods of verifying the tax compliance status of a bidder. The South African Revenue Services does not issue Tax Clearance Certificates anymore but has introduced an online provision via eFiling, for bidders to print their own Tax Clearance Certificates which they can submit with their bids or price quotations.

3.3. Accounting Officers and Accounting Authorities are required to accept printed or copies of Tax Clearance Certificates submitted by bidders and to verify their authenticity on the eFiling. The verification result recorded as per 2.1 of this Treasury instruction must be filed for audit purposes.

3.4. Where a bidder does not submit a tax compliant status PIN but provides a Central Supplier Database Number, Accounting Officers and Accounting Authorities must utilise the Central Supplier Database Number via the Central Supplier Database website www.csd.gov.za to access the supplier records and to verify the bidder's tax compliance status. A printed screen view at the time of verification must be attached to the Supplier's records for audit purposes.

3.5. Where goods and services are procured from foreign suppliers with tax obligation in South Africa, proof of tax compliance status must be obtained from the supplier.

- 3.6. Foreign suppliers with neither South African tax obligation nor history of doing business in South Africa must complete the questionnaire on the SBD 1. Where a recommendation for award of a bid has been made to a foreign bidder, accounting officers and accounting authorities must submit the bidder's completed SBD 1 to the South African Revenue Services at the following email address: GovernmentInstitute@sars.gov.za. The South African Revenue Service will issue a confirmation of tax obligations letter to the accounting officer or accounting authority confirming whether or not the foreign entity has tax obligations in South Africa.
- 3.7. There is no need to require proof of a supplier's tax compliance status where goods and services are procured by institutions such as South African Embassies and Missions or any other South African office outside the borders of South Africa for use outside the country.

4. Application during Supply Chain Management Process

- 4.1. Designated employee(s) must verify the bidder's tax compliance status prior to the awarding of price quotations or competitive bids.
- 4.2. Where the recommended bidder is not tax compliant, the bidder must be notified in writing of their non-compliant status and the bidder must be requested to submit written proof from SARS of their tax compliance status or proof that they have made an arrangement to meet their outstanding tax obligations within 7 working days. The bidder should thereafter provide the accounting officer or accounting authority proof of their tax compliance status which should be verified via the Central Supplier Database or eFiling.
- 4.3. Should the recommended bidder fail to provide written proof of their tax compliance status in terms of paragraph 3.2 above, accounting officers and accounting authorities must reject the bid submitted by the bidder.
- 4.4. Where goods or services have been delivered satisfactorily without any dispute, accounting officers and accounting authorities must not delay the processing of payments as a result of outstanding tax matters.
- 4.5. In all instances, accounting officers and accounting authorities must ensure that systems are in place in their respective institutions to ensure that all invoices are paid within 30 days from receipt of an invoice, unless determined otherwise in a contract or other agreement.

SCHEDULE 16

DECLARATION OF INTEREST

Bidder must complete all sections of the SBD4 in black ink and ensure that the form is signed by an authorised person.

NB: Non-compliance with the requirements stipulated above will lead to disqualification of the bid at Pre-compliance evaluation.

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

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

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:.....

2.3 Position occupied in the Company (director, trustee, shareholder², member):
.....

2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹“State” means –

- a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act,

1999 (Act No. 1 of 1999);

- b) any municipality or municipal entity;
- c) provincial legislature;
- d) national Assembly or the national Council of provinces; or
- e) Parliament.

²“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

.....

Name of state institution at which you or the person

connected to the bidder is employed :

Position occupied in the state institution:

.....

Any other particulars:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....

.....

.....
2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:
.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.9.1 If so, furnish particulars.
.....
.....
.....

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2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:
.....
.....

.....

3. Full details of Directors / Trustees / Members / Shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Peral Number

4. DECLARATION

I, THE UNDERSIGNED (NAME)..... CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

SCHEDULE 17

DECLARATION OF BIDDER'S PAST SCM PRACTICES

Bidder must complete all sections of the SBD 8 in black ink and ensure that the form is signed by an authorised person.

NB: Non-compliance with the requirements stipulated above will lead to disqualification of the bid at Pre-compliance evaluation

CERTIFICATION

SBD 8

DECLARATIONS OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- a) This Standard Bidding Document must form part of all bids invited.
- b) It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- c) The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - i) abused the institution's supply chain management system;
 - ii) committed fraud or any other improper conduct in relation to such system; or
 - iii) failed to perform on any previous contract.
- d) In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

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Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

I, THE UNDERSIGNED (FULL NAME).....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

SCHEDULE 18

CERTIFICATE OF INDEPENDENT BID DETERMINATION

Bidder must complete all sections of the SBD 9 in black ink and ensure that the form is signed by an authorised person.

NB: Non-compliance with the requirements stipulated above will lead to disqualification of the bid at Pre-compliance evaluation

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

Transport Education Training Authority

do hereby make the following statements that I certify to be true and complete in every respect: _____

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I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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 **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.**
10. 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.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

SCHEDULE 19

- **NB: ONE (1)** Pricing/ Costing schedule must be submitted in a separate sealed envelope together with the Standard Bidding Document **SBD 3.3**.
- A copy of the Pricing/Costing Schedule must be submitted in a **separate Virus Free USB**.

PRICING SCHEDULE (Professional Services)

SBD 3.3

NAME OF BIDDER:..... BID NO.:
 CLOSING TIME 11:00 CLOSING DATE.....

OFFER TO BE VALID FORDAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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- The accompanying information must be used for the formulation of proposals.
- 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. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
-----		R-----	R-----
-----		R-----	R-----
-----		R-----	R-----
-----		R-----	R-----
-----		R-----	R-----

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

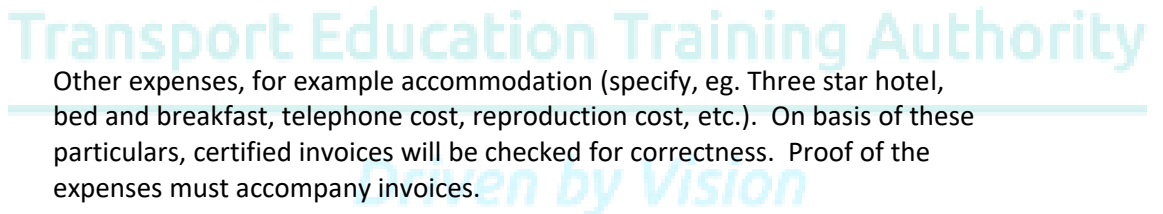
----- R----- -----days

----- R----- -----days
 ----- R----- -----days
 ----- R----- -----days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....
TOTAL:		

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



5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....
TOTAL:		

6. Period required for commencement with project after acceptance of bid

7. Estimated man-days for completion of project

8. Are the rates quoted firm for the full period of contract? *YES/NO

9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....
.....
.....

***[DELETE IF NOT APPLICABLE]**

Any enquiries regarding bidding procedures may be directed to the –

(TRANSPORT EDUCATION TRAINING AUTHORITY, 344 PRETORIA AVENUE, TETA HOUSE,
RANDBURG)

Tel: 011 577 7000

Or for technical information –

(ZUKISANI MANGALISO)

Tel: 011 577 7026



Transport Education Training Authority

Driven by Vision

SCHEDULE 20

PRICING / COSTING SCHEDULE

- **NB: ONE (1)** Pricing/ Costing schedule must be submitted in a separate sealed envelope together with the Standard Bidding Document **SBD 3.3**.
- A copy of the Pricing/Costing Schedule must be submitted in a **separate Virus Free USB**.

All prices must be VAT inclusive and must be quoted in South African Rand (ZAR).

- The TETA will not entertain pricing adjustments.
- All pricing shown must EXCLUDE VAT, with the VAT components being as shown separately;
- All pricing assumptions, excluded costs and estimated costs must be clearly documented;
- TETA assumes that the pricing document as supplied is complete and covers all costs associated with this good/services.

Item No.	Description of equipment / services	Amount / Value
1		
2		
3		
4		
5		
6		
7		
8		
	TOTAL EXCLUDING VAT	
	15% VAT AMOUNT / VALUE	R
	TOTAL AMOUNT / VALUE (INCL. VAT)	R

SCHEDULE 21

RESEARCH PROPOSAL (TETA EVALUATION CHECKLIST)

CHECKLIST FOR THE APPOINTMENT OF A SUITABLE SERVICE PROVIDER AND

REQUEST FOR BID TO CONDUCT A COMPREHENSIVE STUDY TO IDENTIFY FACTORS WHICH HINDER ACCESS AND SUCCESS IN POST SCHOOL EDUCATION AND TRAINING, AND THE IMPLICATIONS FOR THE DEMAND AND SUPPLY SKILLS TO THE TRANSPORT SECTOR

NB: This checklist is expected to assist TETA in ensuring consistency and completeness in assessing consultants applying to carry out a nationwide study on a comprehensive study to identify factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector.

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
1	Introduction	Did the consultant introduce the research theme properly and put it in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
1.1	Introduction of the study theme	Consultant must indicate what they perceive to be the purpose of the study				
1.2		General outlook of transport sector in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
1.3		Transport sector and the context of identifying				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector in South Africa				
1.4		Transport sector and the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
1.5		Qualification, experiences and accreditation of transport sector skills trainers, aggregated overview of transport sector performance in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
1.6		Policy and legislative relevance of transport sector skills training in SA including employment, in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
2	Research background	Did the consultant packaged and clearly explain the suitability of their approach on the transport sector skills development profiles: - categories, targets, impact in the context of identifying the factors which hinder access and				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector in South Africa? (all chambers i.e., comprehensive approach)				
2.1	General background of the value-chain skills in the transport sector and or chambers	Aerospace				
2.2		Forward and clearing				
2.3		Freight and handling				
2.4		Maritime				
2.5		Rail				
2.6		Road transport				
2.7		Road passengers				
3	Statement of the research problems	How did the consultant link the theme of the study to the problem statement emphasizing the key problems identified in the literature and desktop study?				
3.1	Skills sector imbalance if any in view of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	<ul style="list-style-type: none"> • The gender imbalance of the tracer study • The race imbalance of the tracer study • The age imbalance of the tracer study • Provincial imbalance of the tracer study 				
3.2	Skills repository status in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the	Data on transport sector research and development with respect in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
	demand and supply skills to the transport sector					
3.3	Skills needs and gaps	Identifying chamber related factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
3.4	Employment status of in the context of the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	<ul style="list-style-type: none"> • Employed % • Unemployed % • Self-employed % • Others % 				
3.5	Quality of trainings in the transport sectors technological changes and industry strategy implications for labour market outcomes of graduates in South Africa	Quality of workplace skills training and Sector Skills Plan required in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
3.6	Quality of new trainings requirements in the transports sector in the context of identifying the factors which hinder access	<ul style="list-style-type: none"> • Demonstrations on the job • Practicals in class • Application of skills acquired • Workplace learning environment • Assessments of trainees 				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
	and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector					
3.7	Post training employment challenges and retraining	<ul style="list-style-type: none"> • Employed % • Unemployed % • Self-employed % • Others % 				
3.8	Research objectives	Service provider must outline in the proposal the key research objectives and number them to cover the scope of the study				
4	Key research questions	Coverage and fundamentals of the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector questions to be answered outlined and correspond with the objectives				
4.1	Fundamental questions emanating from covid-19	<ul style="list-style-type: none"> • Are the questions feasible in terms of covid-19? • How clear are the questions in terms of addressing the study theme? • Explain how answers to the questions will eventually be confirm, refuted, or extend previous findings and provides new findings in the context of identifying the factors which hinder access and 				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
5	Significance/objectives of the study	The consultants should indicate what they consider to be the main significance or objectives of the study				
5.1	Significant areas of the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	The relevance and trends of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
5.2		Skills gap between what employers want and skills acquired during training in view of the context of the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
		Funding for training during the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
5.3		Explain if unemployed trainees are not employed because of the factors which hinder access and success in Post School Education and Training,				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		and the implications for the demand and supply skills to the transport sector				
5.4		How they will go about investigating the training gaps and future skills - needs in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
5.5		Most prominent skills of WSP and SSP				
5.6		Current stakeholder skills expectations in the transport sector				
6	Literature review	Explain how the literature review will set the current concept of the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector (Secondary data)				
6.1	The concept of sector skills processes and reporting	Briefly explain their understanding in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
6.1.1		Gaps and reporting to capture chamber specific issues in respect the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
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		the transport sector				
6.1.2		Ways and meaning of exploring the skills gaps due to the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
6.2	Definition of skills in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector terminologies in the transport sector	Findings from published materials such as books, policies and legislations, journal articles, official documentations etc.,				
6.2.1		Define subject areas with respect to the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
6.2.2		Define key terms and terminologies with respect to identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
6.2.3		Identify cases of skills accuracy of skills needs and gaps capturing				
6.2.4		Identify case studies supporting credibility of chamber specific needs and how they address skills need				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
6.2.5		Establish a SWOT if necessary				
7	Methodology	The background of the method of approach to conduct the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
7.1		Explicit step by step approach to be followed to carry out the study				
7.2	Key Informants (KI) interviews	<p>How will the consultant organize key stakeholder interviews with the following? -</p> <ul style="list-style-type: none"> • Aerospace • Forwarding and clearing • Freight handling • Maritime • Project office • Rails • Road freight • DoT • Road passenger • SD and LP • Institutions, accredited trainers, and qualifications • Taxi • Others 				
7.3		How will the consultants go about addressing how they will unpack the gaps expressed by the				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
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	Transport sector skills beneficiaries survey on trainings, in the context of the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	<p>key beneficiaries of skills training such as: -</p> <ul style="list-style-type: none"> • Aerospace • Forwarding and clearing • Freight handling • Maritime • Project office • Rails • Road freight • DoT • Road passenger • SD and LP • Training institutions and accredited trainers • Taxi • Others 				
7.4	Survey on skills training in the	<p>Did the consultants explain clearly how they will explore and survey the organization of trainings such as training chamber for learners? -</p> <ul style="list-style-type: none"> • Workshops • Classroom's teaching • Demonstrations schemes 				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
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	context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	<ul style="list-style-type: none"> • Practicals exercises for leaners • Equipment used for trainings • Selection of learners • Assessment of leaners • Others 				
7.5	Survey to assess the leaners skills and benefits	<p>How will the consultants undertake the survey on the relevance of skills acquired by the learners such as? -</p> <ul style="list-style-type: none"> • Relevance to job requirements • Relevance of practicals • Adaptation to job requirements • Gaps in training if any • Ability to find job or be self-employed after training • Remunerations of employed trainees • Others 				
7.6	Data collection processes: - on identifying the factors which hinder access and success in Post School Education and Training, and	Primary and secondary data collection methods				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
	the implications for the demand and supply skills to the transport sector					
7.7	Secondary data collection	Refer to 6.1 and 6.2 of this table for secondary data collection guide				
7.8	Primary data collection	What will be the method for data collection e.g. observations or data collection directly from first-hand interviews				
7.9	Primary data sourcing	<p>Primary sources that will be used for the collection of data in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector: -</p> <ul style="list-style-type: none"> • Questionnaires • Interviews, pilot and testing of questionnaires • Focus group interviews • Observation (direct) • Case studies • Diaries • Critical incidents 				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		<ul style="list-style-type: none"> • Portfolios • Others 				
7.10	Administration of questionnaires	Sampling procedure				
7.10.1	Definitions of sampling frames	Definition of target population for the survey <ul style="list-style-type: none"> • Sampling frame • Criteria for sampling • Sampling technique for KI and target respondents) 				
7.10.2	Key informants sampling	Description of the sampling frames (KIs)				
	Types of sampling	From the (list in 7.4) which sampling techniques will be useful for the research in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector? <ul style="list-style-type: none"> • Random sampling • Stratified sampling • Stratified random • Double sampling • Systematic 				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		<ul style="list-style-type: none"> Cluster sampling Others 				
7.10.3	Administration of questionnaires to respondents	<p>From the (list in 7.4) which sampling technique will be most suitable for the research in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector?</p> <ul style="list-style-type: none"> Random sampling Stratified sampling Stratified random Double sampling Systematic Cluster sampling Unit/s of observation Others 				
7.10.4	Sample size	Definition of population size and statistical technique to be used				
7.10.5	Data analysis and interpretation	Primary and secondary data analysis				
7.10.5.1	Qualitative and quantitative	Qualitative data interpretation (types to be used for the study)				
7.10.5.2		Quantitative data interpretation (types to be used for the study)				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
	analysis methods	<ul style="list-style-type: none"> • Rating scales • Aggregation of results • Feature of results on skills WSP and SSP • Graphics • Frequency distributions • Statistical techniques package to calculate (mean, average etc. • Conclusion tables • Others 				
7.10.6	Key survey areas in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	How transport sector background analysis will be undertaken with respect to the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector				
7.10.7	Transport sector profiles on	How will the consultants carry out the investigations within the chambers with respect to the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector i.e. past trends and current situation for example: -				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
	skills needs during in the context of identifying the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector	<ul style="list-style-type: none"> • Aim and objectives to be achieved • Skills gaps analysis per sector (refer to 7.4) • Skills types and profiles • Skills use • Current skills need • Future skills need • Status of skills audit <p>Training needs New and emerging skills needs Workplace Skills in each chamber Mitigation strategies to fill skills gaps if any Hiring practices by transport sectors Expectations from accredited skills trainer in the transport sector Transport sector options on quality of training (do they meet their basic requirements?) Issues of remuneration of trainees General economic climate hampering Others</p>				
8	Report outline	Is the project report outline provided in the proposal? _____				
8.1	Report outline	The factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector report outline detailing the				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		main deliverables of the study covering all the sections				
8.2	Progress reports	Consultants should explain how they will provide monthly progress report with respect to: - <ul style="list-style-type: none"> • Status quo or situational analysis • Questionnaires administration • Field survey processes • Results and interpretations • Recommendations • Soft copies • Hard copies • Final report and summary for TETA board members • Publication of the research • Others • Others 				
9	Quality of the project execution plan proposed	Does the Project Execution Plan (PEP) report correspond to the (excel spread sheet and time frames in the appendix?)				
9.1	Introduction	How will the consultants respond to the context of identifying the factors which hinder access and success in Post School Education and				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		Training, and the implications for the demand and supply skills to the transport sector in the transport sector in the PEP				
9.2	Main stages of the PEP	<p>Main agreed stages with TETA in the PEP with respect to: -</p> <ul style="list-style-type: none"> • Inception • Status-quo • The surveys desktop and field • Recommendations • Results in report form • Publication of the results • Dissemination of the results • Others 				
9.3	Approach to the content of the study in the report part of the PEP	<ul style="list-style-type: none"> • Work undertaken by the consultant on the factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector and work undertaken • How factors which hinder access and success in Post School Education and Training, and the implications for the demand and supply skills to the transport sector will be achieved vis a vis 				

Research items		Checklist list items to be considered	Does not meet requirements	Meets requirements partially	Meets most of the requirements	Recommendation
			Decision rating scale for the assessment of the research proposal			
			0-3	4 -6	7 - 10	
		<p>the objectives of the study</p> <ul style="list-style-type: none"> The key study areas (<i>refer to 7.11.7</i>) 				
9.4	Details of the PEP	Outline of the details and time frames of all deliverables in the PEP with cost schedules				
9.5	How will the consultants deliver?	<p>Why the consultants think they are the most qualified to undertake the study</p> <ul style="list-style-type: none"> Introduction Definition of deliverables Resource persons in the team (responsibility of team members) How they will work together and deliver the goods 				
9.6	Project and programme management	How will the study be managed until successful completion and close-out?				
9.7	Cost schedules	How will detail cost for each deliverable and disbursements be addressed (in the appendix)				
9.8	Risk register	How will the consultants indicate and address the potential risks of the project in the proposal? (in the appendix)				
9.9	Gantt chart	Is the project gnat chart corresponding to the project time frames provided in the proposal?				