



REQUEST FOR QUOTATION

YOU ARE HEREBY INVITED TO SUBMIT A QUOTATION FOR ONLINE LEARNING PROGRAMME FOR NINETY- FIVE (95) EMPLOYEES FOR A PERIOD OF TWELVE (12) MONTHS.

RFQ NUMBER:	ECIC071Q-2022/23- Re-issue
CLOSING DATE AND TIME:	2 November 2022 11H00 (South African Standard Time)
RFQ VALIDITY PERIOD	60 days (Commencing from the RFQ closing date)
DESCRIPTION	Request for quotation for online learning programme for ninety- five (95) employees for a period of twelve (12) months.
EMAIL FOR SUBMISSION OF QUOTES	procurement@ecic.co.za
ENQUIRY	Name: Lopang Kwape Tel: 012 471 3876 procurement@ecic.co.za
This bid is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2017, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of contract conflict with the general conditions of contract, the special conditions of contract prevail.	

REQUEST FOR QUOTATION: PROVISION OF ONLINE LEARNING PROGRAMME FOR NINETY- FIVE (95) EMPLOYEES

Terms of Reference

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A. INTRODUCTION TO THE REQUEST FOR QUOTATION

1. Introduction

- 1.1 The Export Credit Insurance Corporation of South Africa (SOC) Ltd (ECIC)¹ is a self-sustained state-owned entity listed under Schedule 3B of the Public Finance Management Act 1 of 1999 (as amended) and established in terms of the Export Credit and Foreign Investments Insurance Act 78 of 1957 (as amended).
- 1.2 The mandate of the ECIC is to facilitate and encourage South African export trade, by underwriting export credit loans and investments outside the country, to enable South African contractors to win capital goods and services contracts in countries outside South Africa. The ECIC is a registered short-term insurer and is regulated by the Financial Sector Conduct Authority and Prudential Authority. Currently exempted in terms of FAIS Notice 78 of 2019.
- 1.3 ECIC operates from offices at Block C7 Eco Origins Office Park, 349 Witch Hazel Avenue, Highveld Ext 79, Centurion, 0157, South Africa.

2. Background

- 2.1 Technology has impacted various organisation and industries on a global scale, and advancements are still being introduced, changing the way we live, work and study. Learning and Development has undergone significant upgrades most learning is done remotely, at the convenience time and location for employees. The ECIC e-Learning Programme will make learning simpler, easier, and more effective for the Corporation.

3. Purpose

- 3.1 The purpose of this RFQ is to request to appoint a service provider to offer the e-Learning Programme to ninety-five (95) ECIC employees for a period of twelve (12) months.

4. Submission of the proposals

- 4.1 Bid documents must be clearly marked for ease of reference.
- 4.2 Bid documents must be submitted on PDF format to the following email address:

procurement@ecic.co.za

¹ Further information on the ECIC can be found at www.ecic.co.za

B. TERMS OF REFERENCE

5. Scope of work

5.1 The appointed bidder to provide online courses using learner management system (LMS) for ninety-five (95) employers for a period of twelve (12) months. The following courses must be included in the LMS platform:

5.1.1 Off the shelf catalogue

Table 1

No	Course	Estimated Duration	No of Delegates
1.	Assertiveness skills	01- 06 Hours	95 users
2.	Business Etiquette	01- 06 Hours	95 users
3.	Coaching and Mentoring	01- 06 Hours	95 users
4.	Code of conduct and ethics awareness	01- 06 Hours	95 users
5.	Collaborative Business Writing	01- 06 Hours	95 users
6.	Creative Thinking	01- 06 Hours	95 users
7.	Customer Care	01- 06 Hours	95 users
8.	Emotional intelligence	01- 06 Hours	95 users
9.	Meeting management	01- 06 Hours	95 users
10.	MS Excel basic, intermediate, advanced	01- 06 Hours	95 users
11.	Ms Excel VBA basic	01- 06 Hours	95 users
12.	MS Outlook basic, intermediate, advanced	01- 06 Hours	95 users
13.	MS PowerPoint basic, intermediate, advanced	01- 06 Hours	95 users
14.	MS Word basic, intermediate, advanced	01- 06 Hours	95 users
15.	Project Management	01- 06 Hours	95 users

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No	Course	Estimated Duration	No of Delegates
16.	Stakeholder Management	01- 06 Hours	95 users
17.	Stress Management	01- 06 Hours	95 users
18.	Time Management	01- 06 Hours	95 users
19.	Work life balance	01- 06 Hours	95 users

5.1.2 Courses required based South African content or legislations (to be developed or customised)

Table 2

No	Course	Estimated Duration	No of Delegates
1.	Anti-money laundering	01- 06 Hours	95 users
2.	Data Protection Regulation	01- 06 Hours	95 users
3.	Ergonomics	01- 06 Hours	95 users
4.	Ethics awareness Code of conduct	01- 06 Hours	95 users
5.	FAIS Level 1 Regulatory	01- 06 Hours	95 users
6.	Manage Personal Finance	01- 06 Hours	95 users
7.	Managing workplace discrimination	01- 06 Hours	95 users
8.	Occupational health and safety	01- 06 Hours	95 users
9.	Onboarding/Induction (ECIC Content)	01- 06 Hours	95 users
10.	Prevention and Combating of Corrupt Activities Act overview	01- 06 Hours	95 users
11.	Public Finance Management (PFMA) overview	01- 06 Hours	95 users
12.	Sexual Harassment at the workplace	01- 06 Hours	95 users
13.	The Protection of Personal Information (POPI) Act	01- 06 Hours	95 users
14.	Tip Off Anonymous- Whistleblowing	01- 06 Hours	95 users

5.2 In their response, the bidder must indicate if their proposed courses as required in Table 2 are off-the shelf or required to be developed (refer to Annexure 3). All courses not indicated as Off-Shelf will be regarded as to be developed. ECIC will not accept any bid if the courses to be developed are more than 40% of the required courses on the list (in this Table 2).

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5.3 The provided LMS must meet or provide for the following:

- 5.3.1 Offshelf courses must provide for either video learning, and/or PowerPoint slides and/or PDF slides or animation. Refer to Table 1 above.
- 5.3.2 The courses must provide for assessment, course evaluation and learner certification (each course).
- 5.3.3 Progress reports as and when required on completed courses (the reports must include statistics on number of delegates who attempted the courses, number of delegates who successfully completed the course, number of courses completed).
- 5.3.4 For South African content development, the provider should use either video learning and/or PowerPoint slides and/or PDF or animation. Refer to Table 2 above.

6. Requirements

- 6.1 All courses must be provided on a secure online LMS platform, which allows for the courses to be accessed and administered online.
- 6.2 ECIC will not take ownership of the LMS and the LMS must be hosted in the cloud by the provider.
- 6.3 In addition to the above courses the bidder should list any additional courses available on their catalogue.
- 6.4 The appointed bidder will be required to train two ECIC administrators through online training or face to face on how to use the LMS Platform.

7. Bid/contract conditions

- 7.1 The appointed bidder shall be responsible to pay any user related LMS subscriptions (where applicable) for ninety-five (95) users per annum for the duration the contract.
- 7.2 The appointed bidder will be required to customise the LMS with ECIC corporate branding, logo and each course rebranded according to ECIC requirement.
- 7.3 The provided LMS must be able to Integrate with the ECIC ICT infrastructure for easy access and single system sign in (ECIC uses Microsoft Active Directory).

8. Bid evaluation

8.1 The proposals will be evaluated as follows:

8.1.1 Evaluation Phase One: Pre-Qualification and Compliance

- 8.1.1.1 ECIC will not accept any bid if the courses to be developed are more than 40% of the required courses on the list (refer to Annexure 3).

- 8.1.1.2 ECIC will only consider a bid if the relevant bidder meets the pre-qualification criteria mentioned in paragraphs 8.1.1.1. Where a bidder fails to meet the pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

8.1.2 Evaluation Phase Two: Preference point system

- 8.1.2.1 This bid will be evaluated using the preference points system. The formula below will be used to calculate the preference procurement points for price:

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid or offer under consideration

Pmin = Comparative price of lowest acceptable bid

- 8.1.2.2 Depending on the bidder's level of broad-based black empowerment contribution, a maximum of 20 points may be allocated to a bidder. The points scored by a bidder for broad-based black economic empowerment contribution will be added to the preference procurement points allocated for price.
- 8.1.2.3 The table below reflects the number of points to be allocated to a bidder based on broad-based black economic empowerment contribution:

Table 3

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

8.1.3 Phase Three: Objective criteria

- 8.1.3.1 In this evaluation stage, ECIC will check if the bidder has a person who meet the following criteria in awarding the bid:

- 8.1.3.1.1 The bidder has a significant shareholder or owner (or equivalent) (directly or indirectly) who is classified or can be classified as a Prominent Influential Person (PIP) in accordance with Financial Intelligence Centre Act, 38 of 2001 (FICA) as amended.
- 8.1.3.1.2 The bidder has a shareholder or member or owner (or equivalent) who has questionable integrity status.
- 8.1.3.1.3 The bidder has a director or equivalent who is classified or can be classified as a PIP in accordance with FICA.
- 8.1.3.2 Should it be found during this evaluation stage, that the bidder who has attained the highest points under Evaluation Stage Two (Preference Point System) has persons listed in paragraphs 8.1.3.1.1 to 8.1.3.1.3, ECIC reserves the right to conduct further due diligence on the person(s). Should the outcome of a further due diligence not be satisfactory to ECIC or such a person(s) poses an unacceptable high risk reputation and/or integrity of the person(s) be questionable, ECIC reserves the right not to award the bid to that bidder. This process may be repeated to the next bidder if so required.

C. ANNEXES

Annexure 1: Terms and conditions of request for quotation

1. The potential bidders are required to provide the goods/services as indicated on the scope of work or specifications of good/services required by the corporation. ECIC standard conditions of purchase shall apply.
2. ECIC reserves the right not to procure the goods and/or services.
3. Late and incomplete submissions will not be accepted.
4. Bidders are required to attach the latest Central Supplier Database (CSD) report from the National Treasury, or register their company onto the CSD website address: www.csd.gov.za.
5. Bidders are required to submit B-BBEE Certificates/ sworn affidavits from the dtic website for QSE and EME suppliers with their quotations. Failure to submit the BEE Certificate will disqualify the bidder from earning BBEE points.
6. No services must be rendered, or goods delivered before an official ECIC Purchase Order has been to the supplier.
7. Bidders are required to complete and return the attached Standard Bidding Documents.
8. Bidders are required to attach the company profile to their submissions, where applicable.
9. ECIC reserves the right to conduct site visits to the selected bidders.
10. ECIC reserves the right to conduct business with ethical suppliers.
11. ECIC reserves the right to disqualify any bidder, based on any one or more of the following, and such disqualification may take place without prior notice to the non-compliant bidder.
 - 11.1. bidders who submitted incomplete information and documentation essential for the adjudication of the requirements of this RFQ;
 - 11.2. bidders who submitted information that is fraudulent, factually untrue or inaccurate, for example memberships that do not exist, experience, etc;
 - 11.3. bidders who received information not available to other vendors through fraudulent means; and/or
 - 11.4. bidders who do not comply with mandatory requirements as stipulated in this RFQ.
12. All bidders to note that payments are processed within 30 days after receipt of the invoice.

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13. This terms and conditions govern the contract for procurement of goods/services for the ECIC.
14. ECIC reserves the right to request for demonstration of products or items as and when required through presentation.
15. ECIC preferred bidders should obtain a Purchase Order prior to rendering of services or providing goods to the corporation. Should there be additional services/goods which were not part of the initial purchase order, ECIC will not be responsible for payment of such without a purchase order.

16. **Awarding a bid**

16.1. ECIC will not award a bid to a bidder:

- 16.1.1. Who is or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder are restricted to conduct business with the State.
- 16.1.2. Who is in the employ of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who is in the employ of the State as contemplated in the Public Administration Management Act, 11 of 2014 and is prohibited from conducting business with the State in terms of section of PAMA.
- 16.1.3. Who is in the service of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder and has not declared their business interest as required in the applicable SBD4 form.
- 16.1.4. Has been found to have transgressed Prevention and Combating of Corrupt Activities Act, 12 of 2004 (as amended).
- 16.1.5. Has been found to have transgressed or is transgressing the Competition Act, 89 of 1998 (as amended).
- 16.2. ECIC shall not award a bid or contract or order to a bidder whose tax affairs are not compliant, except to foreign bidders with no tax obligations in South Africa.
- 16.3. For a bidder or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who have declared their business interest as required in the applicable SBD4 form, ECIC will not award a bid to a bidder who has declared their interest and:

- 16.3.1. Is prohibited from conducting business with the State; or
- 16.3.2. Does not have permission to conduct remunerative work outside their employment.
- 16.4. ECIC will verify with the relevant Organ of State to determine if paragraphs 16.3.1 and 16.3.2 are not applicable.
- 16.5. ECIC will assume that, the person contemplated in paragraph 16.3 is prohibited from conducting business with the State or the person does not have permission to conduct remunerative work outside their employment if it does not receive any response within 21 days from such verification request to an Organ of State.
- 16.6. ECIC will then recommend to award the bid to the bidder who achieved the second highest preference points, and should it be established that, the bidder who achieved the second highest preference points have a person contemplated in paragraph 16.3, ECIC will conduct verification as contemplated in paragraphs 16.4 and 16.5. This step can be performed to up to the bidder who achieved the third highest preference points.

Annexure 2: Protection of Personal Information

PROTECTION OF PERSONAL INFORMATION

1. ECIC recognises that when the Bidder submit its proposal in response to this Request for Quotations, it will provide personal information, which ECIC will process for the sole purpose of evaluating the Bidder's proposal. By submitting its proposal in responding to this Request for Quotations, the Bidder hereby provide its consent to the processing of its Personal Information by ECIC.
2. The following terms shall have the meaning ascribed to them:
 - 2.1. **"Personal Information"** shall bear the same meaning as ascribed to it under POPI;
 - 2.2. **"POPI"** means Protection of Personal Information Act, No. 4 of 2013;
 - 2.3. **"Responsible Party"** shall bear the same meaning as ascribed to it under POPI; and
 - 2.4. **"RFQ"** means this Request for Quotations.
3. ECIC as the Responsible Party undertakes to:
 - 3.1. comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;
 - 3.2. treat all Personal Information strictly as defined within the parameters of POPI;
 - 3.3. process Personal Information only in accordance with the consent it was obtained for, for the purpose agreed, as permitted by law;
 - 3.4. secure the integrity and confidentiality of any Personal Information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss, damage, unauthorised destruction, access, use, disclosure or any other unlawful processing of Personal Information;
 - 3.5. not transfer any Personal Information to any third party in a foreign country unless such transfer complies with the relevant provisions of POPI regarding transborder information flows; and
 - 3.6. not retain any Personal Information for longer than is necessary for achieving the purpose in terms of RFQ or in fulfilment of any other lawful requirement.
4. ECIC will ensure that all reasonable measures are taken to:
 - 4.1. identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;

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- 4.2. establish and maintain appropriate security safeguards against the identified risks;
 - 4.3. regularly verify that the security safeguards are effectively implemented;
 - 4.4. ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;
 - 4.5. provide immediate notification to the Bidder if a breach in information security or any other applicable security safeguard occurs; provide immediate notification to the Bidder where there are reasonable grounds to believe that the Personal Information has been accessed or acquired by any unauthorised person;
 - 4.6. remedy any breach of a security safeguard in the shortest reasonable time and provide the Bidder with the details of the breach and, if applicable, the reasonable measures implemented to address the security safeguard breach;
 - 4.7. provide immediate notification to the Bidder where the Bidder has, or reasonably suspects that, Personal Information has been processed outside of the purpose agreed to or consented to;
 - 4.8. provide the Bidder, upon request, with all information of any nature whatsoever relating to the processing of the Personal Information for the purpose of the RFQ and any applicable law; and
 - 4.9. notify the Bidder, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the Bidder.
5. The Bidder has the right to inspect the Personal Information processing operations, as well as the technical and organisational information security measures employed by the ECIC to ensure compliance with the provisions of this Annexure.

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Annexure 3: List of Courses to be customised

1. Courses required based South African content or legislations (to be developed or customised)
2. The bidder must indicate if their proposed courses as required in the table below are off-the shelf or required to be developed. All courses not indicated as Off-Shelf will be regarded as to be developed. ECIC will not accept any bid if the courses to be developed are more than 40% of the required courses on the list.

No	Course	Estimated Duration	No of Delegates	Bidder must indicate if Off-The-Shelf or to be Developed (or customised)
1.	Anti-money laundering	01- 06 Hours	95 users	
2.	Data Protection Regulation	01- 06 Hours	95 users	
3.	Ergonomics	01- 06 Hours	95 users	
4.	Ethics awareness Code of conduct	01- 06 Hours	95 users	
5.	FAIS Level 1 Regulatory	01- 06 Hours	95 users	
6.	Manage Personal Finance	01- 06 Hours	95 users	
7.	Managing workplace discrimination	01- 06 Hours	95 users	
8.	Occupational health and safety	01- 06 Hours	95 users	
9.	Onboarding/Induction (ECIC Content)	01- 06 Hours	95 users	
10.	Prevention and Combating of Corrupt Activities Act overview	01- 06 Hours	95 users	
11.	Public Finance Management (PFMA) overview	01- 06 Hours	95 users	
12.	Sexual Harassment at the workplace	01- 06 Hours	95 users	
13.	The Protection of Personal Information (POPI) Act	01- 06 Hours	95 users	
14.	Tip Off Anonymous- Whistleblowing	01- 06 Hours	95 users	

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Annexure 4: Pricing schedule for ninety-five (95) employees over (12 months)

1. The bidder must provide ECIC with pricing based on the template (example) below. The pricing shall be firm for the duration of the contract. The bidder must clearly indicate whether pricing (in South African Rands) is inclusive or exclusive of Value Added Tax at 15%.
2. For comparative purposes, bidders pricing must follow the following example:

Item No.	Description	Amount (R)
1	LMS Subscription cost for 95 users	XXXXXXXX
2	Of the shelf courses fees	XXXXXXXX
3	Instructional Course design and Development fees- new courses	XXXXXXXX
4	E-learning administration and support fees	XXXXXXXX
Subtotal		XXXXXXXXXX
VAT @ 15% (where applicable)		XXXXXXXX
Total including VAT		XXXXXXXXXX

3. The bidders must ensure that their bid amount include all applicable and associated costs.
4. ECIC will only accept fixed prices for the contract term. The quoted price must be an all-inclusive price.
5. The quotation must be on the letterhead of the bidder.

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D. APPLICABLE STANDARD BIDDING DOCUMENTS

SBD 1

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE EXPORT CREDIT INSURANCE CORPORATION OF SOUTH AFRICA (SOC) LIMITED					
BID NUMBER:	ECIC071Q-2022/23	CLOSING DATE:	02 November 2022	CLOSING TIME:	11H00
DESCRIPTION	PROVISION OF ONLINE LEARNING PROGRAMME FOR NINETY-FIVE (95) EMPLOYEES.				
BID RESPONSE DOCUMENTS MUST BE SENT TO THE FOLLOWING EMAIL ADDRESS:					
Preferably via email: procurement@ecic.co.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Lopang Kwape		CONTACT PERSON	Lopang Kwape	
E-MAIL ADDRESS	procurement@ecic.co.za		E-MAIL ADDRESS	procurement@ecic.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> YES <input type="checkbox"/> NO [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

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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:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

- 1.1. Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.
- 1.2. Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. BIDDER'S DECLARATION

- 2.1. Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest² in the enterprise, **YES/NO** employed by the state?
- 2.1.1. If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

² the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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

2.2.1. If so, furnish particulars:

Full Name (Name of person employed by Export Credit Corporation of South Africa (SOC) Ltd, the procuring institution)	Relationship

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

2.3.1. If so, furnish particulars:

Name of Related Enterprise	Registration (ID) Number

3. DECLARATION

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

- 3.1. I have read and I understand the contents of this disclosure;
- 3.2. I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
- 3.4. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6. There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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.

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

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

Name of declarer			
Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	

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

- a) The value of this bid is estimated to **not exceed** R1 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or
- b) ~~Either the 80/20 or 90/10 preference point system will be applicable to this tender (delete whichever is not applicable for this tender).~~

1.3 Points for this bid shall be awarded for:

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

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

	POINTS
PRICE	
B-BBEE STATUS LEVEL OF CONTRIBUTOR	
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 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

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“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 goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“price”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

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:

80/20 or 90/10

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

4.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME-GENERATING PROCUREMENT

4.3 POINTS AWARDED FOR PRICE

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

80/20 or 90/10

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{max} = Price of highest acceptable bid

5. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 5.1 In terms of Regulation 6 (2) and 7 (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

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B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
7	2	4
8	1	2
Non-compliant contributor	0	0

6. BID DECLARATION

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

7. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

7.1 B-BBEE Status Level of Contributor: =(maximum of 10 or 20 points) (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

8. SUB-CONTRACTING

8.1 Will any portion of the contract be sub-contracted?
(***Tick applicable box***)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

8.1.1 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	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

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 least 51% owned by:	EME √	QSE √
Black people	<input type="checkbox"/>	<input type="checkbox"/>
Black people who are youth	<input type="checkbox"/>	<input type="checkbox"/>
Black people who are women	<input type="checkbox"/>	<input type="checkbox"/>
Black people with disabilities	<input type="checkbox"/>	<input type="checkbox"/>

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Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
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		

9. DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm:.....

9.2 VAT registration number:.....

9.3 Company registration number:.....

9.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

9.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

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- 9.7 Total number of years the company/firm has been in business:.....
- 9.8 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 contributor indicated in paragraphs 1.4 and 6.1 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 paragraphs 1.4 and 6.1, 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 contributor 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) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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			BIDDER	
1.	Name		Name	
	Signature		Signature	
2.	Name		Address	
	Signature			

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E. Administrative Checklist

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/ NO
1.	Quotation.		Is the quotation on the letterhead of the bidder and duly attached to the response?	
2.	Annexure 3		Did the bidder complete Annexure 3, and indicate which proposes courses are off the shelf and which ones will be customised (developed)?	
3.	SBD 1	Invitation to bid	Is the form duly completed and signed?	
4.	SBD 4	Declaration of Interest	Is the form duly completed and signed?	
5.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2017	Is the form duly completed, B-BBEE points claimed, and form signed?	
6.	B-BBEE status level verification certificate or Sworn Affidavit		Is proof of B-BBEE Status level of contributor attached? Bidder must attach copy of B-BBEE Certificate or copy of Sworn Affidavit, whichever is applicable.	

I, the undersigned (name) certify that the information furnished on this checklist is true and correct.

Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	