



Transport Education Training Authority

*Driven by Vision*

## COMPLIANCE CHECKLIST OF RETURNABLE DOCUMENTS BY THE BIDDER

### SCHEDULE 20 – COMPLIANCE CHECKLIST OF RETURNABLE DOCUMENTS

#### MANDATORY REQUIREMENTS – STAGE 1 EVALUATION

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

**NB. Tick with “X” if you comply / not comply / Not Applicable**

Criterion	Requirement	Comply	Not Comply	Not Applicable
Invitation to bid (SBD 1)	<ul style="list-style-type: none"> <li>The form must be completed and signed electronically or in black ink.</li> </ul>			
Bid submission	<ul style="list-style-type: none"> <li>Bid documents must be completed in full and all declarations of interest must be signed. For JV or consortium all declarations must be signed by all parties.</li> <li><b>Only one (1) original copy</b> must be submitted, signed by an authorised representative (s).</li> <li>This is a Two-Envelope System for the <b>Research Proposal / Technical Proposal and Pricing Proposal</b>.</li> <li>The <b>Research Proposal / Technical Proposal</b> <b>MUST</b> be submitted <b>separately</b> from the Price Proposal Schedule and SBD 3.3. form.</li> <li>Price Proposal and SBD 3.3 form must be submitted in <b>separate</b> clearly marked sealed envelope. This envelope must be clearly marked with the bidder’s name and tender description.</li> <li>A second copy of the <b>Research Proposal / Technical Proposal</b> <b>MUST</b></li> </ul>			

Criterion	Requirement	Comply	Not Comply	Not Applicable
	be submitted per a virus free USB and MUST not include the Pricing Proposal and information relating to Pricing.			
Pricing / Costing Schedule	<ul style="list-style-type: none"> <li>Submit the Pricing/Costing Schedule in <b>separate sealed envelope</b> clearly marked with bidder's name, tender description, and tender number</li> <li>The bidder must fully complete and sign the SBD 3.3 form electronically or in black ink.</li> <li><b>Failure to submit Pricing Envelope separately will disqualify the bid.</b></li> </ul>			
Declaration of Interest (SBD 4)	<ul style="list-style-type: none"> <li>The bidder must fully complete and sign the Declaration of interest form electronically or in black ink.</li> <li><b>For JV or consortium both parties must complete and sign this declaration, per company.</b></li> </ul>			
SARS Pin / CSD Supplier Number	<ul style="list-style-type: none"> <li>The bidder must submit a SARS Pin with expiry date to assist with verification of Tax Affairs.</li> <li>If a SARS Pin is not submitted provide CSD Supplier Number. <b>In a case of a JV, all companies' Tax Clearance Certificates or SARS pins must be submitted</b></li> </ul>			
Proposal submission	<ul style="list-style-type: none"> <li>This is a Two-Envelope System for the <b>Research Proposal / Technical Proposal</b> and <b>Pricing Proposal</b>.</li> </ul>			
Briefing Session	<ul style="list-style-type: none"> <li>A compulsory briefing session will be scheduled through a video conferencing facility. Details will be shared accordingly.</li> <li><b>NB. Service providers who fail to attend the compulsory briefing session will be disqualified from the bidding process.</b></li> </ul>			
Central Supplier Database <u>Registration</u>	<ul style="list-style-type: none"> <li>The bidder must be registered as a supplier with Treasury on <b>www.csd.gov.za. (Please attach proof)</b></li> </ul>			

## DEFINITELY NON-NEGOTIABLE REQUIREMENTS (STAGE 2 EVALUATION)

All bidders who pass the Mandatory Requirements will be evaluated on the following DNN Requirements and a bidder who fails to meet any of these requirements will be disqualified from further evaluation of Quality:

Criterion	Requirement	Comply	Not Comply	Not Applicable
Experience of a <b>Lead Researcher</b> in similar assignments	<ul style="list-style-type: none"> <li>The <b>Lead Researcher</b> must at least have <b><u>led and completed 3 research studies</u></b> in his/her prospective field not older than 5 years.</li> </ul> <p><b>NB. Complete the respective Schedule of the FRB document</b></p>			
<b>Lead Researcher</b> Qualifications	<ul style="list-style-type: none"> <li>The Service Provider must provide TETA with a <b>Lead Researcher</b> with the minimum qualification of a <b>Master's</b> in Education, Economics, Statistics Transport and Logistics, Social Sciences or any related discipline.</li> </ul> <p><b>NB. Attach certified copies of qualifications and CV of the Lead Researcher. Uncertified qualification certificates will not be accepted as authentic.</b></p>			
<b>Consent Letter</b> by the Lead Researcher	<ul style="list-style-type: none"> <li>The service Provider must submit a signed Consent Letter by the Lead Researcher</li> </ul>			
Minimum number of <b>Lead Researcher References</b> in similar assignments	<ul style="list-style-type: none"> <li>The <b>Lead Researcher</b> must submit a minimum of <b>three (3) references</b> according to the 3 studies conducted and completed.</li> </ul> <p><b>NB. Capture the references in the Experience Schedule to the RFB Document.</b></p>			
Human Resource Capacity	<ul style="list-style-type: none"> <li>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).</li> </ul> <p><b>NB. Please provide certified copies of the qualification certificates (not copies of certified copies)</b></p>			