



**TERMS OF REFERENCE**

**RESEARCH STUDY ON THE IMPACT OF COVID-19 ON  
CATHSSETA SUB-SECTORS AND ITS IMPLICATIONS FOR  
SKILLS DEVELOPMENT**

**BID NUMBER: CATHS/loC-19/13/2021**

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**TERMS OF REFERENCE/SPECIFICATIONS OF SERVICES REQUIRED:  
CATHS/loC-19/13/2021**

**RESEARCH STUDY ON THE IMPACT OF COVID-19 ON  
CATHSSETA SUB-SECTORS AND ITS IMPLICATIONS FOR  
SKILLS DEVELOPMENT**

Briefing Session	None
Technical and SCM enquiries by	06 August 2021
Closing date	13 August 2021
Envisaged Evaluation date	16 August 2021
Envisaged Adjudication date	20 August 2021
Envisaged Appointment and Award date	24 August 2021
Project Start Date	01 September 2021
Bid Validity period	90 days from closing date

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**PART A  
INVITATION TO BID**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CATHSSETA**

BID NUMBER:	CATHS/loC-19/13/2021	CLOSING DATE:	13 August 2021	CLOSING TIME:	11H00am
BID DESCRIPTION	APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO CONDUCT A RESEARCH STUDY ON THE IMPACT OF COVID-19 ON CATHSSETA SUB-SECTORS AND ITS IMPLICATIONS FOR SKILLS DEVELOPMENT				
VALIDITY PERIOD	NINETY (90) DAYS AFTER THE CLOSING DATE				
BRIEFING SESSION					

**BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT**

CATHSSETA HEAD OFFICE

270 GEORGE ROAD, ERAND GARDENS, MIDRAND

ERAND GARDENS, MIDRAND

JOHANNESBURG

**BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**

**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

CONTACT PERSON	TUMELO MASITENG	CONTACT PERSON	TUMELO MASITENG
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	<u>supplychain@cathsseta.org.za</u>	E-MAIL ADDRESS	<u>supplychain@cathsseta.org.za</u>

**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]**

1. 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]	2. 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)?

 YES  NO

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- DOES THE ENTITY HAVE A BRANCH IN THE RSA?  YES  NO
- DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  YES  NO
- DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  YES  NO
- IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?  YES  NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

## 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 THE 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:

.....



## 1. Background and Context

The Skills Development Act No. 97 of 1998 as amended (SDA) makes provision for the establishment of Sector Education and Training Authorities (SETAs) for each national economic sector and thereby aims to develop the skills of the South African workforce by increasing the investment in education and training in the labour market; and encouraging employers to play a meaningful role in developing employees, particularly the previously disadvantaged. The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) was established through the SDA, to research and establish a nationally recognised Sector Skills Plan (SSP) supported by skills development programmes serving the interests of the following sectors:

- Culture, Arts and Heritage;
- Tourism and Travel Services;
- Hospitality;
- Gaming and Lotteries;
- Conservation; and
- Sport, Recreation and Fitness.

These sectors are diverse and unique, and they play a significant role not only in the economy, but also in the broader quest for social cohesion and formulation of a unique South African national identity. CATHSSETA's critical success factors are described as the key processes that deliver services to the CATHSSETA beneficiaries, i.e., learners and employers. The process is based on the three critical components of the CATHSSETA service delivery value chain:

- Facilitation of Learning Interventions: Involves facilitation of all skills development initiatives.
- Quality Assurance of Skills Development: Involves accreditation of skills development providers, verification of learners, and development of occupational qualifications.
- Employer engagements: Involves the receipt of levies and payments of grants.

The importance of the three areas are the points of integration between them.

## 2. Overall objective

The objective of this bid is to appoint a suitably qualified research institution/organisation to examine the overall impact of Covid-19 on CATHSSETA sub-sectors and its implications for skills development. The main objectives of the study are to:

- 2.1. Determine and analyse short to medium term effects of Covid-19 on the sector and recommended recovery plans within each sub-sector:
  - 2.1.1. Analyse the impact of Covid-19 on economic performance and related labour market trends in the sector;
  - 2.1.2. Development/emerging trends in education and training as a result of Covid-19;
  - 2.1.3. Understanding the impact of Covid-19 on SMMEs in the sector; and
  - 2.1.4. Analyse the impact in relation to existing skills and possible skills gaps in the sector
- 2.2. Assess the applicability of the Economic Reconstruction and Recovery Plan, and the Economic Recovery Skills Strategy in response to Covid-19 and the implementation progress in relation to CATHSSETA and its sub-sectors;
- 2.3. Analyse short to medium term intended and unintended consequences of resources and relief funds allocated to assist the sector;
- 2.4. Analyse access to education and training opportunities during and post Covid-19; and Projections on how vaccination will affect sub-sectors with strong linkages in international markets.

## 3. Project Scope and Specifications

South Africa accounts for the highest number of recorded coronavirus cases in Africa. To mitigate the risk of infection, South Africa put in place strict measures to manage the risk of infection which weakened the South African economy. CATHSSETA sub-sectors have been amongst the hardest hit economic sectors and most negatively affected by the Pandemic.

Whilst the overall immediate economic impact of Covid-19 has been well documented, a more detailed analysis for each of the CATHSSETA sub-sectors is not readily available, especially in relation to its implication on the Post-School Education and Training (PSET) sector. The aim of this study is examining the overall impact of Covid-19 on CATHSSETA sub-sectors and its implications for skills development. The following sub-sectors will be the focus of the study:

- Culture, Arts and Heritage;
- Tourism and Travel Services;
- Hospitality;
- Gaming and Lotteries;
- Conservation; and

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- Sport, Recreation and Fitness.

The approach to the study will also include:

- An appraisal of all CATHSSETA strategy documents and all relevant policy documents;
- The identification of gaps between the results of the study and CATHSSETA's strategy, including recommendations on how identified gaps can be closed.

### **3.1. Research Questions**

The key research questions to be answered by this study are:

- 3.1.1. How has Covid-19 affected CATHSSETA sub-sectors?
  - 3.1.1.1. What are the short to medium term effects of Covid-19 on the sectors?
  - 3.1.1.2. How has Covid-19 affected SMMEs operating in CATHSSETA sub-sectors?
- 3.1.2. What are the adaptive requirements needed by the CATHSSETA sub-sectors to recover from Covid-19?
- 3.1.3. What is the progress on the implementation of sub-sector recovery plans?
- 3.1.4. How can the sector and CATHSSETA implement the Economic Reconstruction and Recovery Plan to revive CATHSSETA sub-sectors?
- 3.1.5. How have occupational patterns and skills provision changed as a result of emerging trends induced by Covid-19 for each of the sub-sectors?
- 3.1.6. Using an economic forecasting model, what impact will green pass vaccination have on CATHSSETA sub-sectors?
- 3.1.7. How has Covid-19 affected education and training provision in the CATHSSETA sub-sectors?
- 3.1.8. What are the skills implications of Covid-19 on CATHSSETA sub-sectors?
- 3.1.9. What are the short to medium term intended and unintended consequences of resources and relief funds allocated to assist the sector?

### **3.2. Research Design and Methodology**

It is expected that the study will include both qualitative and quantitative research approaches, including the following:

- 3.2.1. Analysis of all relevant documents, including a detailed literature review at the domestic, regional, and global level;
- 3.2.2. Development of research tools and instruments (e.g., survey questionnaires);
- 3.2.3. Sampling framework, and sectoral profile of targeted respondents; and
- 3.2.4. Any sources of data that may provide insight into the research outcomes.

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**3.3. Deliverables expected from the study.**

- 3.3.1. An inception report following discussion with CATHSSETA, including a detailed research project plan;
- 3.3.2. Monthly progress reports;
- 3.3.3. Detailed literature review prior to development of research instruments;
- 3.3.4. All research instruments and tools to be signed off by CATHSSETA;
- 3.3.5. Draft report for review;
- 3.3.6. Power-point presentations to accompany all reports submitted to CATHSSETA;
- 3.3.7. Presentation to the CATHSSETA Management and Governance structures;
- 3.3.8. All completed instruments, transcripts, field work reports, datasets, meta data analysis plans etc.; and
- 3.3.9. A final report of the study in hard copy and electronic formats. There will be three versions of the report, namely 5, 15 and full-page formats (a five-page executive summary of the whole report, a 15-page executive report and a full report with a minimum of 60 pages).

**3.4. Competencies and Skills set required.**

- 3.4.1. Strong understanding and knowledge of the PSET sector;
  - 3.4.2. Demonstrate understanding of the CATHSSETA operating environment and the six (6) sub-sectors;
  - 3.4.3. Ability to lead and manage a research project of this nature should be demonstrated by providing a list of similar projects completed in the past five years with contactable references;
  - 3.4.4. Good knowledge and understanding of research methodologies and experience in applying them;
  - 3.4.5. Ability to systematically gather, analyse, synthesize relevant evidence and data from a range of sources, identify relevant materials and assess quality and identify gaps;
  - 3.4.6. Ability to write concise and focused reports that are credible, useful, and actionable, address key research questions and show the evidence, analysis, synthesis, and recommendations;
  - 3.4.7. Demonstrate strong project management skills, including field coordination and implementation where necessary;
  - 3.4.8. Strong management of resources to deliver high quality research and results on time and to appropriate standards;
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- 3.4.9. Provide a detailed organogram of project team with roles and responsibilities (please submit CV of proposed key members of the project team with certified copies of qualifications). Qualifications that are not certified will result in non-scoring.

**3.5. Structure of the Proposal**

- 3.5.1. Understanding of the research/study and the ToR (background to the research, rationale, purpose, objectives);
- 3.5.2. Approach, design, and methodology for the research/study (e.g., literature and documentation review, sampling framework, suggestions for elaboration or changes to scope and methodology as outlined in the ToR, examples of research questions suggested, process elements);
- 3.5.3. Activity-based plan (including number of person days per activity and timeframe linked to activities);
- 3.5.4. Activity-based budget (in South African Rand, including VAT);
- 3.5.5. Competence (include list of related projects undertaken and contactable references);
- 3.5.6. Team organogram (team members, roles, and level of effort of each person involved in the project);
- 3.5.7. Quality management plan (demonstrate ability to quality assure research process in the methodology to ensure high quality product and services);
- 3.5.8. Research policy nexus (indicate how the research findings can be engaged with to promote utilization by CATHSSETA and the sector);
- 3.5.9. Reporting;
- 3.5.10. Risks/mitigation measures;
- 3.5.11. The following attachments:
  - 3.5.11.1. References for related research undertaken by the service providers;
  - 3.5.11.2. CVs of key personnel; and
  - 3.5.11.3. Certified copies of key personnel qualifications

A. Milestones and date of completion of service.	Bidder to propose work plans and estimated timelines in line with the contract period
B. Contact details for technical enquiries	<a href="mailto:supplychain@cathsseta.org.za">supplychain@cathsseta.org.za</a>
C. Contact details for procurement enquiries	<a href="mailto:supplychain@cathsseta.org.za">supplychain@cathsseta.org.za</a>

#### 4. Details of CATHSSETA role and functions in the service/project

CATHSSETA will:

- 4.1. Oversee the Service Level Agreement (SLA);
- 4.2. Make available relevant data and information where required;
- 4.3. Provide guidance where applicable;
- 4.4. Monitor and evaluate progress; and
- 4.5. At its discretion, assist with access to relevant partners and stakeholders.

#### 5. Qualifications and Critical Requirements

**Requirements for bid submission:**

- 5.1. Provide and attach a valid copy of Tax Compliance Pin
- 5.2. Provide and attach a valid copy of the Broad-Based Black Economic Empowerment (BBBEE) Certificate, should the bidder wish to claim BBBEE points
- 5.3. Provide and attach the most recent CSD report (not older than three (3) months)
- 5.4. The bid documents must be completed in full, and all declaration of interests must be signed
- 5.5. Provide and attach a copy of the Company Registration documents
- 5.6. Detailed research proposal as indicated in 3 Project Scope and Specifications
- 5.7. The bidder must provide a company profile
- 5.8. Lead researcher with a minimum of a Master's degree in Social Sciences/Economics/Statistics or any related disciplines and ten (10) years research experience
- 5.9. A research team comprising of an Economist, Project Manager/Coordinator, Research Analyst, Fieldwork Manager with a minimum of a Bachelor's degree in related disciplines and three (3) years research experience
- 5.10. Must demonstrate a track record in conducting research in related fields
- 5.11. Extensive experience in undertaking large scale research projects in skills development, education and training and market research
- 5.12. Provide a minimum of two (2) reference letters from contactable references demonstrating experience and a minimum of one (1) research report of work done over the past five years in similar research projects
- 5.13. Demonstrate understanding of the relevant skills development and related legislation;
- 5.14. Sufficient capacity and an appropriately skilled team to carry out parallel activities to undertake and complete research projects by the required dates; and
- 5.15. Access to resources and infrastructure arrangements (organogram, systems, local and international networks etc.).

## 6. Monitoring and reporting requirements after the contract is signed

The following reporting requirements will be set up and managed in order to meet the deliverables:

- 6.1. The project manager of the appointed service provider will report to the CATHSSETA Specialist: Research, Planning and Performance.
- 6.2. The project will be regularly monitored at determined intervals according to identified outputs.
- 6.3. Monthly written progress reports will be delivered in the agreed format and/or as when required.
- 6.4. The details of identified risks and mitigation plans to be included in this report.
- 6.5. Feedback meetings will be arranged through the project manager.
- 6.6. No changes to the project will be effected unless by prior discussion and approval by CATHSSETA.
- 6.7. The service provider shall keep an accurate record of evidence on work done as the project will be subject to CATHSSETA external and internal audits.
- 6.8. The draft action plans will be an annexure of the SLA and form the basis for monitoring and reporting.

## 7. Price specification/ requirements

- 7.1. Price must be quoted in South African currency and must be inclusive of VAT.
- 7.2. A firm fixed price (rates) is required for the duration period of the contract.
- 7.3. The Bidder is required to specify the rates to be charged per position (Pricing Schedule) which will also be used for pricing evaluation purposes. The rates indicated should be inclusive of VAT, where applicable.
- 7.4. In the event that personnel hold a position different to the stipulated ones under the Pricing Schedule, the Bidder is required to allocate those personnel to an existing position and indicate the actual position in brackets next to their name:

## 8. Contract Period

Contract Period: 8 months

## 9. Validity period

**Validity period:** 90 days. The Bidder is required to confirm that the **bid** price and the conditions of the **bid** are not subject to any change by the bidder.

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**Costs:** The total costs must be fixed for the duration of the contract and all escalations must be worked into the final bid price upon submission, no price adjustments will be done after the award.

**10. Available data/information to the potential supplier relevant to this bid**

The CATHSSETA's Strategic Plan, Sector Skills Plan and Annual Performance Plan are available on the CATHSSETA website. [www.cathsseta.org.za](http://www.cathsseta.org.za)

**11. Transfer of knowledge and training**

Yes – Skills transfer to relevant custodians

**12. The following bid process will be followed**

Tender Advert Request for Proposal	<b>23 July 2021</b>
Briefing Session	None
Closing date for Request for Proposals	<b>13 August 2021</b>

13/11/21

**Stage 1 - Functionality Evaluation**

**Stage 2 – Price and B-BBEE Evaluation**

Functionality Evaluation criteria	Sub-evaluation Criterion	Weighting
<p>The bidder must provide a detailed response to the following six (6) elements:</p> <ol style="list-style-type: none"> <li>1. Understanding of the research/study and the ToR (background to the research, rationale, purpose, objectives);</li> <li>2. Approach, design and methodology for the research study</li> <li>3. Quality management plan (demonstrate methodology to ensure high quality product and services)</li> <li>4. Research policy nexus (indicate how the research findings can be engaged with to promote utilization by CATHSSETA and the sector;</li> <li>5. Reporting;</li> <li>6. Risks/mitigation measures;</li> </ol>	<p>Proposal provides all six elements on the approach and methodology that will be used in examining the impact of Covid-19 on CATHSSETA sub-sectors as elaborated on in the ToRs</p>	25
	<p>Proposal provides four to five elements on the approach and methodology that will be used in examining the impact of Covid-19 on CATHSSETA sub-sectors as elaborated on in the ToRs</p>	20
	<p>Proposal provides three elements on the approach and methodology that will be used in examining the impact of Covid-19 on CATHSSETA sub-sectors as elaborated on in the ToRs</p>	15
	<p>Proposal provides less than three elements on the approach and methodology that will be used in examining the impact of Covid-19 on CATHSSETA sub-sectors as elaborated on in the ToRs</p>	0
<p>Detailed project plan for the service to be provided according to the following five elements:</p> <ol style="list-style-type: none"> <li>1. Scope of work;</li> <li>2. Project objectives;</li> <li>3. Activity-based plan (including number of person days per activity and time frame linked to activities);</li> <li>4. Budget allocation (in South African Rand, including VAT);</li> <li>5. Outcomes, milestones and deliverable;</li> </ol>	<p>The project plan provides all five elements covering services to be provided as outlined in ToRs;</p>	15
	<p>The project plan provides three to four elements covering services to be provided as outlined in ToRs;</p>	10
	<p>The project plan provides two elements covering services to be provided as outlined in ToRs</p>	5
	<p>The project plan provides less than two elements covering services to be provided as outlined in ToRs;</p>	0
<p>The experience of the bidder/bidding institution is illustrated in the areas listed under the detailed scope of services.</p>	<p>Submitted five or more contactable reference letters and three research reports relating to similar work / project done in the last 5 years</p>	20
	<p>Submitted three to four contactable reference letters and two research reports</p>	15

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**13. Evaluation Criteria**

This bid will be evaluated in two (2) stages as follows:

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Illustrated instances of comparative or similar projects in terms of the scope of service and ToRs by submitting contactable reference letters and research reports related to similar work/project.	relating to similar work / project done in the last 5 years	
	Submitted two contactable reference letters and one research report relating to similar work / project done in the last 5 years	10
	Submitted less than two contactable reference letters and no research report relating to similar work / project done in the last 5 years	0
The lead researcher/ Project Lead of the bidding institution must have a minimum of a Master's degree and demonstrate experience in leading a team to execute a project of this nature or similar.  The bidder must provide CVs and certified copies of qualifications of the Project Lead/ Lead researcher and project team in line with the competencies and skills outlined under scope of services.	Submitted CVs and certified copies of qualifications and expertise of Project Lead/ Lead researcher with a Doctoral (PhD) Degree and 10 years' experience in the field of research.	20
	Submitted CVs and certified copies of qualifications and expertise of Project Lead/ Lead researcher with a Master's Degree and 10 years' experience in the field of research.	15
	Non submission of all CVs and certified copies of qualifications and expertise of Project Lead/ Lead researcher with a minimum of Master's Degree and 10 years' experience in the field of research.	0
A research team comprising of an Economist, Project Manager/Coordinator, Research Analyst, Fieldwork Manager with a minimum of a Bachelor's degree in related disciplines and three (3) years research experience	Submitted CVs and certified copies of Master's qualifications of key personnel to fulfil competencies and 3 years' experience in the field of research	20
	Submitted CVs and certified copies of Bachelor's qualifications of key personnel to fulfil competencies and 3 years' experience in the field of research	15
	Non submission of all CVs and certified copies of qualifications and expertise of key personnel.	0

- Bidders must score a minimum of 70 points to proceed to evaluation on Price and BBEE
- Bids that do not meet the minimum qualifying score for functionality will be eliminated from further evaluation.
- The responsive proposals will then be evaluated further based on the 80/20 preference point system in terms of the PPPFA Act and its regulations 2017. (See SBD 6.1)
- The contract will be awarded to the bid proposal that scores the highest total number of points.



#### 14. Bid administrative information

The completed response and submissions must be returned to –

**CATHSSETA Head Office  
270 George Road,  
Erand Gardens, Midrand (Johannesburg),  
Attention: Supply Chain Office**

Bid proposals must consist of **three (3)** hardcopies, **one (1)** original and **two (2)** copies. **one (1)** electronic copy (USB Flash drive).

**Incomplete submissions including the insufficient number of printed or electronic copies will result in disqualification.**

E-mail or fax proposals are **not** acceptable.

Questions for clarification of issues will be considered by the CATHSSETA up to the close of business 06<sup>th</sup> August 2021, all bid-related queries to be sent via email to [supplychain@cathsseta.org.za](mailto:supplychain@cathsseta.org.za). No verbal requests for information or clarification will be accepted. Answers to queries shall be posted to the CATHSSETA website [www.cathsseta.org.za](http://www.cathsseta.org.za) (under Bids) and will therefore be in the public domain.

All documentation and responses will be supplied and exchanged utilising standard Microsoft Office (Word, Excel and PowerPoint) products.

Any attempt to gain information in a manner deemed to be fraudulent or disadvantageous to other respondents or any attempt to influence the outcome of the response evaluation will result in immediate disqualification from the bid process. It should also be noted that any attempt at collusion or fronting, may be reported to SAPS in terms of Section 34 of the Prevention and Combating of the Corrupt Activities Act (PRECCA, 2004)

#### **Mandatory Requirements – Gate One**

Bidders are required to indicate in the checklist below (using a tick) whether or not they have submitted all the mandatory documents.

**Please note that non-submission of mandatory documents will disqualify the bidder from proceeding to the next stage of technical specification evaluation.**

MANDATORY REQUIREMENTS CHECKLIST – GATE ONE	YES	NO	NA
Invitation to Bid - SBD Form 1			
Pricing Schedule – Professional Services - SBD Form 3.3			
Declaration of Interest - SBD Form 4			
PPPFA 2017 Regulations Claim Form - SBD Form 6.1			
Contract Form - Rendering of Services - SBD Form 7.2			
Declaration of Bidder's Past Supply Chain Management Practices - SBD Form 8			
Certificate of Independent Bid Determination - SBD Form 9			
General Conditions of Contract			
Valid Tax Clearance Pin			
Valid BBBEE Certificate Should the bidder wish to claim BBBEE points			
Company Registration Documents			
Central Supplier Database (CSD)			
3 x Hardcopy Proposals & 1 x Electronic Proposal ( <b>USB Flash Drive</b> )			

### Technical Specification(s)/ Technical proposal based on TOR – Gate Two

The technical proposal should address the following content (if applicable) **Refer to Evaluation Criteria:**

- **Background information of service provider.**
  - Service provider Profile / Management structure
- **Proposal regarding the scope of services to be rendered**
  - Approach, Plan and Timelines
  - Project Organisation and logistical arrangements
  - Methodology to ensure successful completion of the contract
  - Business arrangement approach
    - ✓ An overview of the proposed business arrangement;
    - ✓ How CATHSSETA and the service provider will manage risks and realise benefits;
- **Information and evidence to address the evaluation criteria set in the particular**

**bid documents:**

- Proven Credentials and Team Expertise
- Detail of any professional associations the respondents belongs to and indicate the length of membership.
- Performance capabilities (CVs of key personnel to be attached)
- Performance abilities relevant to the scope of services to be rendered
- Senior Management Experience
- Reference sites and contact details where a project of this nature was conducted

All bid proposals must at least adhere to the minimum requirements as specified in the Terms of Reference.

If the bidder suggests certain changes to the General Conditions of the contract or the special conditions of the contract, the proposed changes will be evaluated and if acceptable by CATHSSETA such suggested changes may be included in the contract as special conditions of the contract. If the suggested changes are unacceptable, the General Conditions of the contract and the special conditions of the contract will stand. The potential bidder will then have to decide to abide by the decision or to withdraw its bid proposal.

Supporting documentation should be attached as annexures and cross-referenced to the appropriate section of the bid.

Please note that the scope of services as indicated in this TOR reflects CATHSSETA true requirements and once the contract is signed amendments to the contract will only be allowed in exceptional circumstances. Please ensure that your costing is based on the scope of services to be rendered.

**Disclaimer**

The SETA reserves the right not to appoint a service provider and is also not obliged to provide reasons for the rejection of any proposal. CATHSSETA reserves the right to:

- Award contract or any part thereof to one or more Service Providers;
- Reject all bids;
- Consider any bids that may not conform to any aspect of the bidding requirements;
- Decline to consider any bids that do not conform to any aspect of the bidding requirements;
- Request further information from any Service Provider after the closing date;
- Cancel this tender or any part thereof at any time.

**Bidders' notification**

Unsuccessful respondents will be notified by e-mail.

**Note! All Standard Bid documents must be completed and signed and will form part of a signed contract.**

CEO APPROVAL	
Name	Mr Marks Thibela
Position	CEO
Signature	
Date	22/07/2021
Decision: TOR's <u>Approved</u> /Not Approved/ Comments:	