



REQUEST FOR PROPOSAL (RFP)

RFP NUMBER: RFQ/STR/25/26/088			
CLOSING DATE	29 September 2025	CLOSING TIME	13h00

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Reviewed: Senior Manager: Supply Chain and Contract Management		Controlled: Chief Executive Officer	

**The document shall be revised at least 12 months before next revision date or as per merSETA organisational and operational changes.*

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1. Introduction to Request for Proposal (RFP)

1.1 The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) is a Schedule 3A public entity established in terms of the Skills Development Act (Act No. 97 of 1998), Registration Number 17/merSETA/01/04/20, to facilitate skills development for the Metal and Engineering, Motor Retail and Components Manufacturing, Automobile Manufacturing, Plastics Manufacturing and New Tyre Manufacturing Sectors Automotive Components Manufacturing Chamber.

The merSETA is inviting potential service bidders to submit the proposal for the services described under scope of work.

1.2 The merSETA invites suitably qualified and experienced bidders to submit proposals for the services described under the scope of work.

1.3 This RFP process is subject to section 51(1)(a)(iii) of the Public Financial Management Act (PFMA) of 1999, Treasury Regulations 16A6.1, Preferential Procurement Policy Framework Act (Act No. 5 of 2000) and the Preferential Procurement Regulations (2022 Regulations).

2. Background Information

To record the proceedings of meetings, compile, edit and proofread minutes for the SETA Quarterly Management Review (QMR) Meetings.

3. Objectives of the Service

The objective of this project is to procure services of a minute taker who will be responsible for recording the proceedings of meetings and compilation of minutes for the SETA Quarterly Management Review (QMR) Meetings:

- One (1) physical meeting per quarter of the financial year.
- Monthly ad hoc virtual meetings.

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4. Scope of Work (Service)

- 4.1. Attend scheduled meetings (physically or virtually) and record proceedings of the QMR meetings by using electronic recording equipment.
- 4.2. The bidder will be required to complete a declaration of interest form and a confidentiality undertaking form provided by the merSETA, at every meeting.
- 4.3. The bidder must ensure that minutes are proof-read and edited before the electronic submission is sent to the Senior Manager: Strategic Planning and Reporting and copy Manager: Monitoring and Reporting in Microsoft Word format.
- 4.4. The bidder must ensure that they submit minutes and electronic audio recording thereof to the Senior Manager: Strategic Planning and Reporting five (5) working days after the meeting has taken place.
- 4.5. Details of the safekeeping and disposal of the recordings will be shared with the awarded provider in accordance with the merSETA policy.
- 4.6. The bidder must provide a separate set of proceedings of the meeting in a verbatim format for future reference as and when required by the QMR Committee. Price to be based on number of hours of the meeting (refer to the pricing schedule attached).
- 4.7. Meeting will be held physically or virtually (MS teams) – MerSETA Head Office Address:

8 Hillside Road, Metropolitan Park Building, Block C,
Parktown,
Johannesburg
2193
- 4.8. The merSETA QMR Committee comprise of the following:
 - **Executives, Senior Managers and Manager:** Meetings conducted virtually or physically on-site at the merSETA Head Office. Attended by up to 50 delegates. Duration of meetings are dependent on the number of the agenda items to be tabled.

5. Deliverables

- 5.1. The bidder must have at least five (5) years of experience in the field, a company profile must be submitted as proof.
- 5.2. The bidder must provide five (5) reference letters where work of a similar nature was undertaken by the bidder.

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- 5.3. The bidder must submit at least one (1) example of minutes previously prepared.
- 5.4. The bidder must provide at least two (2) CVs of team members with at least 3 - years relevant experience each.
- 5.5. Providers will be required to submit a detailed explanation of how they propose to ensure the protection of personal information (POPI) whilst it is in their care or possession. The MerSETA expects that the bidder to be in full compliance with the POPI Act and in their explanation the Bidder should address any concerns that the merSETA has in reference to collection, transferring, storage and destruction of personal and or confidential information. **Failure to provide an explanation which illustrates the Providers' compliance with the POPI Act, will result in immediate disqualification.**

6. Duration of the Project

- 6.1 The contract for this project will be for a period of **12 Months**.

7. RFP Submission

- 7.1 Bid documents may be emailed to quotations@merseta.org.za on or before the closing date and closing time.
- 7.2 The merSETA will only consider bid documents received on or before the closing date and time, regardless of the method used to provide them.

8. Late submissions of the RFP

Submission of quotation(s) received late (after the closing date and time) will not be considered.

9. Request for Proposal (RFP) Rules

- 9.1 The following rules will apply for this Request for Proposal:

- 9.1.1 The price(s) quoted shall be valid for a minimum period of 60 days from the closing date and time of this RFP.
- 9.1.2 The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- 9.1.3 The price(s) must include all related expenses, i.e., transport, accommodation, etc. (where applicable).
- 9.1.4 A potential supplier or service bidder must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.

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9.1.5 Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

10 RFP Evaluation Process

10.1 The RFQ will be evaluated in terms of PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Three (3) stages of evaluation process will be undertaken.

10.1.1 Evaluation Stage 1: Compliance

10.1.1.1 All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the mandatory requirements listed below. All bidders failing to provide the required information and documentation in this evaluation stage may face disqualification from further evaluation. Failure to comply with the requirements assessed in Stage 1 (compliance) may lead to the disqualification of bids.

Criteria Description	Supporting Documents
In the event of the bidder being in a joint venture (JV), a signed JV agreement must be submitted (where applicable)	Signed JV Agreement SBD forms must be completed for each legal entity Consolidated B-BBEE certificate or sworn affidavit
Bidders must submit a fully complete Bidder's Disclosure form (failure to declare honestly will lead to bidder being disqualified)	Standard Bidding Document (SBD) 4

10.1.2 Evaluation Stage 2: Technical Evaluation

10.1.2.1 The bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. Any bid that fails to meet the overall minimum threshold of **70%** or has not received the minimum score for any individual component thresholds will be disqualified for further evaluation on price and specific goals.

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No	Evaluation Criteria	Descriptive Indicators	Points
1.	<p>Experience of the Bidder. The bidder demonstrates years of experience similar to the scope of work. This information must be included in the company profile.</p> <p>Experience working with or rendering services to SETAs or public entities is important.</p>	Five (5) years or more experience in the field of minute taking. A Company profile must be submitted as proof.	30
		Four (4) years of experience in the field of minute taking. A company profile must be submitted as proof.	15
		Less than four (4) years' experience in the field.	0
2.	<p>The bidder's track record. The bidder must provide signed reference letter(s) and where similar service was rendered. Letters must be on the client company letterheads and include contact details. The merSETA reserves the right to contact the referee.</p> <p>The reference letters must be from different organisations.</p> <p>Experience working with or rendering services to SETAs or public entities.</p> <p>Appointment letters will not be regarded as reference letter.</p>	Five (5) or more relevant reference letters attached	30
		Four (4) relevant reference letters attached	15
		Less than four (4) and or unsatisfactory reference letter(s) attached	0
3.	Example of minutes previously prepared.	One (1) or more examples of minutes previously prepared.	10
		No example of minutes submitted	0
4.	CVs of team members with at least 3-years relevant experience each.	Two (2) or more CVs of team members with at least 3-years relevant experience each.	10
		No relevant (with at least 3-years' experience) CVs of team members submitted.	0
5.	Bidders will be required to submit a detailed explanation of how they propose to ensure the protection of personal information (POPI) whilst it is in their care or possession. The MerSETA expects that the bidder to be in full compliance with the POPI Act and in their explanation the Bidder should	Fully complies - The bidder has provided a detailed explanation of how they propose to ensure the protection of personal information (POPI) whilst it is in their care or possession	20

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No	Evaluation Criteria	Descriptive Indicators	Points
	address any concerns that the merSETA has in reference to collection, transferring, storage and destruction of personal and or confidential information. Failure to provide an explanation which illustrates the Bidders' compliance with the POPI Act, will result in immediate disqualification.	No fully complies - The bidder has not provided a detailed explanation of how they propose to ensure the protection of personal information (POPI) whilst it is in their care or possession	0
TOTAL WEIGHTING			100%
MINIMUM WEIGHTING SCORE			70%

Each proposal that passed functional evaluation of **70%** and more, will be on equal footing to proceed to this final round of evaluation on price and specific goals.

10.1.3 Evaluation Stage 3: Preference Point System

10.1.3.1 The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent the specific goals. The bid documentation's table below will award points to a bidder for achieving the specific goals.

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Tenderer who has 51% to 100% black people ownership	6	
Tenderer who has 30% to 100% black women ownership	4	
Tenderer who has 30% to 100% black youth ownership	4	
Tenderer who has 30% to 100% White women ownership	2	
Tenderer who has 20% or more owners with disability	4	
Total Points allocated to Specific Goals	20	

Note: Refer to Annexure A for Proof or documentation that may be considered to claim points for specific goal related to persons or categories of persons historically disadvantaged by unfair discrimination.

11 Cost Proposal

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

11.2 The rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the guidelines:

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- 11.2.1 The “Guideline on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)¹” as issued by the South African Institute of Chartered Accountants (SAICA);
- 11.2.2 The “Guide on Hourly Fee Rates for Consultants”, as issued by the Department of Public Service and Administration (DPSA); and/or
- 11.2.3 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

12 merSETA’s RIGHTS

- 12.1 The merSETA is entitled to amend any bid condition, bid validity period, RFP terms of reference, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the merSETA has records of such bidders, may be advised in writing of such amendments in good time, and any such changes will also be posted on the merSETA’s website under the relevant tender information. Therefore, before submitting their bid response, prospective bidders should regularly check the website to stay informed about any amendments related to this matter.
- 12.2 The merSETA reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the merSETA.
- 12.3 The merSETA reserves the right to award this bid as a whole or in part.
- 12.4 The merSETA reserves the right to conduct site visits at bidder’s corporate offices and or at client sites if so required.
- 12.5 The merSETA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in National Treasury Instruction 02 of 2016/2017: Cost Containment Measures, where relevant.
- 12.6 The merSETA reserves the right to request all relevant information, agreements, and other documents to verify the information supplied in the bid response. The bidder hereby gives consent to the merSETA to conduct background checks, including FICA verification, on the bidding entity and any of its directors, trustees, shareholders or members.
- 12.7 The merSETA reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service bidders, if applicable (i.e., where a panel is considered).

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- 12.8 The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.
- 12.9 The merSETA reserves the right to consider the professional conduct and experiences it had with any bidder that rendered similar services to the merSETA in the past 5 years over and above the references put forward by the bidder in its response.

13 UNDERTAKINGS BY THE BIDDER

- 13.1 By submitting a bid in response to the RFP, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the merSETA on the terms and conditions and in accordance with the specifications stipulated in this RFQ document.
- 13.2. The bidder shall prepare for a possible presentation should merSETA require such, and the bidder will be required to make such a presentation within five (5) days from the date the bidder is notified or such a time determined by merSETA of the presentation. Such a presentation may include a practical demonstration of products or services as called for in this RFP.
- 13.3. The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the merSETA during the bid validity period indicated in this RFP, and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 13.4. The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 13.5. The successful bidder accepts full responsibility for the proper execution and fulfillment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with merSETA, as the principal(s) liable for the due fulfillment of such a contract.
- 13.6 The bidder accepts that all costs incurred in the preparation, presentation, and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with the bid will become merSETA property unless otherwise stated by the bidder(s) at the time of submission.

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13.7. Should the bidder require to cede a portion of service(s) in relation to the award, the bidder must inform the merSETA in writing and merSETA reserves the right to accept or reject.

ANNEXURE A

Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist bidders in submitting relevant documents to confirm specific goals.

“**Specific goals**” means specific goals as contemplated in section 2 (1) (d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of Reconstruction and Development programme as published in government gazette No. 16085 dated 23 November 1994.

Please note that:

- Financial account, management account or auditors’ letter should be submitted confirming turnover of the company determining BBBEE status on Affidavit and B-BBEE CIPC certificate in order for the specific goals can be awarded.

Preferential points for tenders without local content requirements.

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Specific goal	80/20 Preference Point system	Example of Submission	Tick if relevant document submitted	Indicate which document have been submitted
Black People Ownership – 51% or more	6	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Women Ownership – 30% or More	4	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Youth Ownership – 30% or More	4	Valid BBBEE certificate/Affidavit or B-BBEE CIPC		
White Women Ownership – 30% or More	2	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
People with Disability (PwD) Ownership	4	Medical certificate		
Total Points allocated to Specific Goals	20			

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Annexure B: Estimate Rates required

Bidders are required to submit the following rates in their proposal:

No.		Estimated Meetings	Rate per day -8hrs	Amount (Including VAT)
1.	Physical Meeting	4		
2.	Virtual Meeting	8		
3.	Traveling to merSETA Head Office (Rate per KM)	4		
	Total (Vat Inclusive)			

Additional Rates

No.	RATES	Amount (Including VAT)
1.	Hourly rates (Physical Meeting)	
2.	Daily Rates - 8hrs (Physical Meeting)	
3.	Hourly rates (Virtual Meeting)	
4.	Daily Rates - 8hrs (Virtual Meeting)	
5.	Rate per kilometer(km)	

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