



merSETA

MANUFACTURING, ENGINEERING
AND RELATED SERVICES SETA

REQUEST FOR PROPOSAL (RFP)

RFP NUMBER: RFQ/HRM/25/26/303			
CLOSING DATE	16 March 2026	CLOSING TIME	16H00

SUPPLY CHAIN CONTACTS AND ENQUIRIES	
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Reviewed: Senior Manager: Supply Chain and Contract Management		Controlled: Chief Executive Officer	

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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 providers to submit the proposal for the services described under scope of work.

1.2 This RFP is subject to the Preferential Procurement Policy Framework Act (Act No. 5 of 2000) and the Preferential Procurement Regulations (2022 Regulations), the General Conditions of Contract (GCC), and, if applicable, any other special conditions of contract. Where, however, the special conditions of the contract conflict with the general conditions of the contract, the special conditions of the contract prevail.

2. Background Information

In terms of the Employment Equity Act 55 of 1998 a designated employer must prepare and implement employment equity plan which will achieve reasonable progress towards employment equity in the workplace. As a designated employer, merSETA recognises its obligation to adhere to the most recent and relevant EE legislative requirement.

Having recently submitted the new Employment Equity Plan for the period 2025 – 2030, merSETA) hereby invites suitably qualified and experienced service providers to submit proposals to lead, facilitate, and support the development of the organisation's Employment Equity (EE) Plan, and review the current EE policy, procedure and practices.

The appointed service provider will be required to ensure alignment with the Employment Equity Act (No. 55 of 1998) as amended, associated regulations, Codes of Good Practice, and any relevant directives issued by the Department of Employment and Labour

3. Objectives of the EE policy,practices and plan review

- 3.1 Review and analyse merSETA's new five-year EE Plan
- 3.2 Review the current EE Policy and procedure
- 3.3 Analyze workforce data and organisational context.
- 3.4 Assess existing EE barriers and provide recommendations.
- 3.5 Ensure compliance with all legislative requirements
- 3.6 Facilitate the EE plan discussion with merSETA management.
- 3.7 Present the final EE Plan and recommendations to management for validation.

4. Scope of Work (Service)

The appointed service provider is expected to:

- 4.1 Conduct a comprehensive review of the current merSETA EE plan

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- 4.2 Conduct a review of the current merSETA EE policy and procedure
- 4.3 Ensure adherence to obligations and readiness for Department of Employment and Labour (DoEL) inspections
- 4.4 Present the final EE plan, and facilitate a discussion with the management Committee on Employment Equity.

4.5 Special conditions

- 4.3.1 The service provider must submit proof of similar EE plan, policy and practices review conducted over the last 3 years (at least 3 reference letters on letterhead of the client to whom services have been rendered).
- 4.3.2 The lead facilitator should have a relevant postgraduate qualification, with at least 5 years' experience consulting in Employment Equity, diversity and transformation. .
- 4.3.3 A detailed CV and qualifications/certificates of the facilitator(s) must be provided.
- 4.3.4 A fully inclusive and detailed quotation (inclusive of VAT) must be submitted with the bid proposal (no hidden cost and no additional cost i.e. accommodation/travelling).
- 4.3.5 The Consultant will be required to submit the reports of the review process with recommendations.

5. Deliverables

- 5.1 Collect relevant data in relation to EE practices of merSETA
- 5.2 Analysis of the workforce profile
- 5.3 Conduct a barrier analysis and recommend affirmative action measures
- 5.4 Analysis of the EE policy, practices and procedure.
- 5.5 Review and compile an Employment Equity Plan
- 5.6 Present the EE plan to HR and the Management Committee and facilitate the discussion to validate the plan.

6. Duration of the Project

- 6.1 The project should be conducted over a period of two Months, commencing March 2026.

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.
- 7.3 The proposal must follow the following submission format:

- A Name of Service Provider Submitting the Proposal
- B Contact Information

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- C Brief Company Profile highlighting experience in Employment Equity
- D CVs of Key Personnel who will be deployed to the project.
- E Project Plan outlining the timelines and implementation plan
- F Reference Letters

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 provider must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.
- 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
A detailed quotation outlining key deliverables	Attach detailed quotation.
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 and 6.1
In the event that the bidder(s) are entering into joint venture or consortium, the joint venture agreement must be submitted.	Valid JV contract

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%** will be disqualified for further evaluation on price and specific goals.

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No	Evaluation Criteria	Descriptive Indicators	Points
1.	<p>Relevant Experience</p> <p>The bidder must demonstrate experience in conducting EE practices and policy review.</p> <p>The bidder must submit three written referrals from their clients within the past three (3) years. The letters must be signed and dated with contact details on official, company letterhead.</p>	<p>Provide signed reference letters from previous clients for whom EE plan and practices review was delivered. The reference letters must be for work done in the last three (3) years and must include:</p> <ul style="list-style-type: none"> - Company name - Company letterhead - Contact person - Contact telephone number and or email. <ul style="list-style-type: none"> • Three (3) reference letters provided = 30 • Two (2) reference letters provided = 20 • Less than two (2) reference letters provided = 0 	30
2.	<p>Methodology and approach</p> <p>Provide project execution plan outlining key project deliverables</p>	<p>A project execution plan outlining how the scope of work will be completed that includes the following:</p> <p>Methodology Resources Timelines</p> <p>Project execution plan with methodology, required resources and timelines = 40</p> <p>Project execution plan with methodology, required resources and no clear timelines = 30</p>	40

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		No project plan = 0	
3.	Organisation / Company Capacity Bidder must provide CV/biographical profile of at least two (2) key team personnel with five (5) or more year experience in the field of EE, diversity and transformation.	Two (2) or more experienced profiles provided. CVs and relevant qualifications in HR, Social Sciences, Business Management from NQF level 7 attached with relevant evidence of capacity to deliver on scope = 30 1 experienced profile provided. CVs and relevant qualifications in HR, Social Sciences, Business Management from NQF level 7 attached with relevant evidence of capacity to deliver on scope = 20 No experienced profile provided. CVs and relevant qualifications in HR, Social Sciences, Business Management from NQF level 7 attached with relevant evidence of capacity to deliver on scope = 0	30
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.

NB: Failure to achieve a minimum score for any of the individual criteria above will result in immediate disqualification

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.

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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:
- 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 specification, 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.

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- 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 providers, if applicable (i.e., where a panel is considered).
- 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.

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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.

ANNEXURE A

Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist providers 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.

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		

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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			

AUTHORISATION SIGNATORIES TO CONFIRM RFP			
The employee signing below hereby affirms the accuracy of the information requested for the proposal.			
Supply Chain Management Representative			
Full Names	Karabo Phalo	Date	05 March 2026
Signature			
Technical Representative			
Full Names	Stephen Tsebela	Date	
Signature			

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