



REQUEST FOR PROPOSAL (RFP)

RFP NUMBER: RFQ/ICT/25/26/143			
CLOSING DATE	15 September 2025	CLOSING TIME	12:00

SUPPLY CHAIN CONTACTS AND ENQUIRIES	
Full Names	Asisipho Matomane
Contact Number	010 219 3293/069 0083 764
Email Address	AMatomane@merseta.org.za
RFP Email Address	quotations@merseta.org.za

Document Title	Request for Proposal(s)		
Document Number	FIN-TP-001(B)	Revision Date	03 June 2024
Page Number	Page 1 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled
Reviewed: Senior Manager: Supply Chain and Contract Management		Controlled: Chief Executive Officer	

7 September 2025

changes.

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

Table of Contents

1. Introduction to Request for Quotation (RFP).....	3
2. Background Information	3
3. Objectives of the Service	3
4. Scope of Work (Service)	4
5. Deliverables	Error! Bookmark not defined.
6. Project Timeline	5
7. RFP Submission	Error! Bookmark not defined.
8. Late submissions of the RFP	6
9. Request for Proposal(RFP) Rules	6
10 Bid Evaluation Process	6



Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 2 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

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

- 2.1 merSETA is required by the Employment Equity Act No. 55 of 1998 and the Skills Development Act No 58 of 1998 to establish a consultative committee that will function as an advisory and consultation committee for Employment Equity and Training matters on behalf of the employer and the employees.
- 2.2 This Request for Proposal (RFP) is issued to procure an electronic board pack software and license subscription for the merSETA Accounting Authority and its Committees

3 Objectives of the Service

- Provide an electronic Board Pack Software as per below scope of work;
- Role and user profile management
- Network offline operational capability
- Storage model
- Hardware requirements
- Licensing model
- Cloud based solution, requires no desktop application
- Reporting capabilities as follows:
 - Dashboard capabilities
 - Notification and reporting capabilities
 - SMS engine integration capabilities

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 3 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

- System exception log reports
- Information security measures:
 - Data classification requirements (sensitive, secret, confidential etc.)
 - Password formatting and expiry management
 - Data encryption methodologies
 - Certificate management

4 Scope of Work (Service)

The merSETA hereby requests a proposal for an electronic Board meeting solution. The merSETA requires access for 42 users (made up of Executive and Non-Executive Directors, Senior Managers and 2 administrators from the Company Secretariat). The Board meeting solution should be able to fully facilitate the electronic distribution of Board meeting packs to all devices. The solution should also be able to ease the logistics of compiling the packs and improve overall governance within the merSETA. The following must form part of the services required:

- 4.1 The system should be securely accessible by all board members from any location and should support strong security features such as encryption or two-phase authentications; The system must be capable of providing enhanced security tools like remote locking;
- 4.2 The system should cater for users on mobile platforms and should also support most modern web browsers;
- 4.3 The system should allow for seamless scheduling of meetings with an online, collaborative meeting space where you can include venue maps; agendas; attendee list; meeting minutes; pre-and post-meeting actions and add related documents; integration capabilities with MicroSoft teams would be advantageous.
- 4.4 The solution should provide for a meeting pack function which allows one to easily collate meeting documents, including agendas, index, minutes, dividers and page numbering, into one file. Board members should be able to perform annotations (highlight text, make notes etc.) and document sign off on their meeting packs, complete questionnaires, ask questions, place votes with or without Wi-Fi;
- 4.5 The solution should provide an intuitive and functionally rich knowledge store;
- 4.6 The solution should provide a centralized, collaborative platform where everyone can access and contribute to good decision making by capturing all decisions made and allowing easy to create surveys.
- 4.7 Extensive end user as well as administrator training on the use of the system;

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 4 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

- 4.8 The system should allow Board members to use its functions and content both online and offline and provide Board members with full access to minutes and resolutions;
- 4.9 Proposals on the setup and configuration of the system on the merSETA premises;
- 4.10 Customizable permissions for data access can be personalized down to the document level and user level to improve privacy and security;
- 4.11 The system should have the ability to create virtual rooms for board committees or smaller groups to allow secure collaboration before and after meetings;
- 4.12 The System must have data migration capabilities.
- 4.13 Through the deployment of this system, the merSETA wishes to achieve the following benefits:
- Administrative time and cost saving;
 - Instant and secure distribution of meeting packs;
 - Collaborative, engaging, and easier to manage meetings;
 - Apps available for Apple, Android and Windows devices;
 - Mitigation of risks through procedures, and
 - Transparency in decision making procedures.

5. REQUIREMENTS

- 5.1. Respondent should have relevant industry experience and expertise on similar business assignments. This should be evident from the company registration and company profile.
- 5.2. A detailed project plan/methodology must be submitted.
- 5.3. The respondent should provide signed, contactable letters of references letters on client letterhead.
- 5.4 Company capacity must be proven by submission of CVs and relevant qualifications of the team to be deployed.

6. Duration of the Project

The project is for a period of **six (6)** months.

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 5 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

7. RFQ Submisson

Bid documents may be emailed to quotations@merseta.org.za on or before the closing date and closing time.

- a. The merSETA will only consider bid documents received on or before the closing date and time, regardless of the method used to provide them.
- b. **Late submissions of the RFP**

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

8. Request for Proposal(RFP) Rules

The following rules will apply for this Request for Quotation:

- a. The price(s) quoted shall be valid for a minimum period of 60 days from the closing date and time of this RFP.
- b. The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- c. The price(s) must include all related expenses, i.e., transport, accommodation, etc. (where applicable). Ind
- d. A potential supplier or service provider must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.
- e. Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

9. RFP Evaluation Process

9.1 The RFP 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.

9.2 Evaluation Stage 1: Compliance

9.2.1 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 will face

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 6 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

disqualification from further evaluation. Failure to comply with the requirements assessed in Stage 1 (compliance) will lead to the disqualification of bids.

Criteria Description	Supporting Documents
Respondent must provide an OEM(original equipment manufacturer) reseller letter or certificate if they are not the OEM of proposed solution. Failure to provide will result in automatic disqualification of respondents proposal	Valid OEM reseller letter or certificate
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
In the event that the bidder(s) are entering into joint venture or consortium, the joint venture agreement must be submitted.	Valid JV contract

9.3 Evaluation Stage 2: Technical Evaluation

9.3.1 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 **80%** will be disqualified for further evaluation on price and specific goals.

No	Requirements	Criteria	Points
1.	Bidder Experience: Bidder should have relevant industry experience and expertise on similar business assignments. This should be evident from the company registration and company profile	Bidders has five(5) or more years industry experience	20
		Bidder has three (3) to four (4) years industry experience	10
		Bidder has two (2) years or less experience industry experience	0

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 7 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

No	Requirements	Criteria	Points
	<p>NB: A company profile demonstrating industry experience must be provided as part of bidders response.</p>		
	<p>Relevant experience:</p> <p>Bidder should provide reference letters related to the scope of work for this RFQ.</p> <p>NB: Reference letters must be on clients letterhead, containing contact information such as email address, telephone/cell phone number and name of signatory and confirmation of work done.</p> <p>Note – merSETA reserves the right to verify all reference letters.</p>	<p>At least 3 (three) signed, contactable reference letters on a company letterhead confirming similar work done</p>	30
		1(one) to 2(two) reference letters attached	20
		No reference letters provided	0
3.	<p>Project Plan and Methodology</p> <ul style="list-style-type: none"> Detailed Phases and Milestones: The plan should clearly outline all phases, key activities, and milestones from initiation to project completion. Resource Allocation: Demonstrates how personnel, tools, and systems will be 	<p>Shows understanding of merSETA's specific requirements and tailors the implementation plan accordingly; i.e. The plan is fully customized to merSETA's needs =</p> <p>The plan does not align with merSETA's needs or is not submitted = 0</p>	25

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 8 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

No	Requirements	Criteria	Points
	<p>organized and utilized throughout the project.</p> <ul style="list-style-type: none"> • Risk Management: Identifies potential risks and provides strategies for mitigation. <p>Monitoring and Reporting: Establishes mechanisms for tracking progress and communicating updates to stakeholders.</p>		
4.	<p>Bidder capacity:</p> <p>The Engagement Manager is required to have experience in implementing and supporting electronic meeting management solutions . A detailed CV with qualification of NQF 7 or higher in Computing related field of study must be attached.</p>	<p><u>CV / Profiles with qualifications attached</u></p> <p>Five (5) years and more experience with copies of relevant qualifications attached = 25</p> <p>Less than five (5) years' experience and/or no relevant qualifications attached = 0</p>	25
TOTAL WEIGHTING			100
MINIMUM WEIGHTING SCORE			80

Each Proposal that passed functional evaluation of **80%** and more, will be on equal footing to proceed to this final round of evaluation on price and specific goals.

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 9 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

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

9.4 Evaluation Stage 3: Preference Point System

9.4.1 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.

10 Cost Quotation

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

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

10.2.1 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);

10.2.2 The "Guide on Hourly Fee Rates for Consultants", as issued by the Department of Public Service and Administration (DPSA); and/or

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 10 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

10.2.3 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

11 merSETA's RIGHTS

- 11.1 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.
- 11.2 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.
- 11.3 The merSETA reserves the right to award this bid as a whole or in part.
- 11.4 The merSETA reserves the right to conduct site visits at bidder's corporate offices and or at client sites if so required.
- 11.5 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.
- 11.6 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.
- 11.7 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).
- 11.8 The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 11 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

11.9 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.

12 UNDERTAKINGS BY THE BIDDER

12.1 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 RFP document.

12.2 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.

12.3 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.

12.4 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.

12.5 The successful bidder accepts full responsibility for the proper execution and fulfilment 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 fulfilment of such a contract.

12.6 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.

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 12 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled



Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 13 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

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.

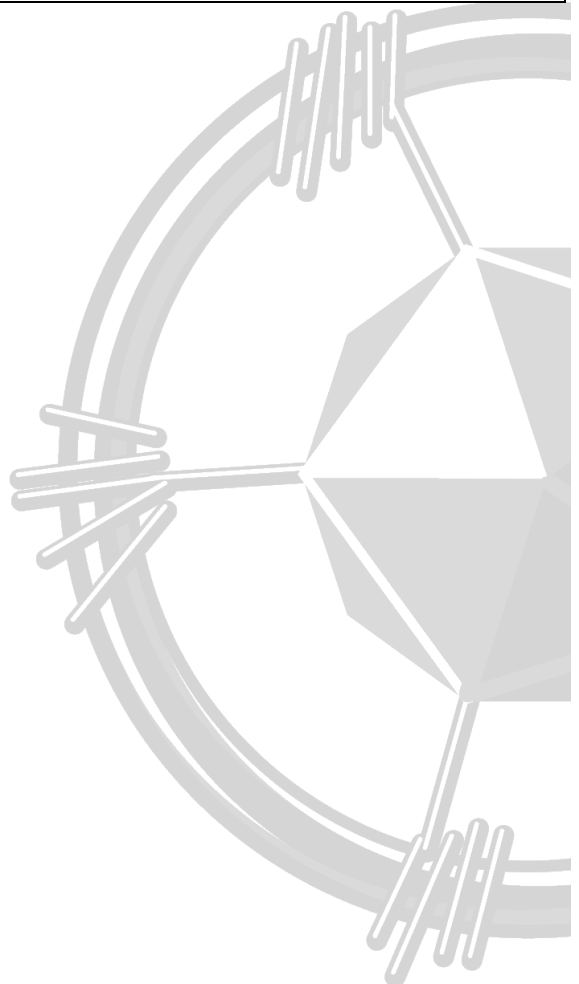
Preferential points for tenders without local content requirements.

7

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			

Document title	request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 14 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

AUTHORISATION SIGNATORIES TO CONFIRM RFP			
The employee signing below hereby affirms the accuracy of the information requested for the Quotation.			
Supply Chain Management Representative			
Full Names	Asisipho Matomane	Date	
Signature			
Technical Representative			
Full Names	Stanley Masete	Date	
Signature			



Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 15 of 15	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled