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| RFP NUMBER: | RFP/SASSETA/25261120 |
| DESCRIPTION: | Appointment of a service provider to conduct a research study on the analysis of the economic contribution of the safety and security sector in South Africa: <i>An Empirical Investigation</i> |
| PUBLISH DATE: | 03 October 2025 |
| CLOSING DATE: | 27 October 2025 |
| CLOSING TIME: | 11h00 am |
| COMPULSORY BRIEFING SESSION DATE | N/A |
| VALIDITY PERIOD: | 120 days from the closing date |
| PREFERENCE POINT SYSTEM | 80/20 |
| BID RESPONSES TO BE SUBMITTED ELECTRONICALLY ONLY | Proposals to be submitted electronically via email to study@sasseta.org.za Quoting the reference (RFP/SASSETA/25261120) |
| ATTENTION: | Ms. Lebo Hlombe |
| <p>The email address (study@sasseta.org.za) is for the submission of tender proposals only and will be accessed by SASSETA after the tender closing date and time.</p> <p>Queries related to this tender are to be sent to scm01@sasseta.org.za</p> | |

NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.

If you receive any suspicious calls asking for payment to secure an award of a bid or the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

SECTION B

1. Invitation to Quote (SBD 1)
2. Pricing Schedule (SBD 3.3)
3. Bidder's Disclosure (SBD 4)
4. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1)
5. Submission Checklist
6. General Conditions of Contract (Annexure A)

NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.

1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be no compulsory briefing session for this Request for Proposal

1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Lebo Hlombe** at scm01@sasseta.org.za by 12h00 on the **17 October 2025**. The bid **number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically only via email to:
study@sasseta.org.za (maximum size of the email 30MB)
- 1.4.1.1 Bidders are advised to compress their email submission(s) to a maximum of 30MB file/folder. **Any submission(s) exceeding 30MB will be automatically rejected by the server.**
- 1.4.1.2 Submission(s) that exceed 30MB can be made through the method of WeTransfer. **Bidders are advised NOT to set expiry date on the submission(s) made.** If a Bidder's response is found to have expired during the evaluation period, it will be considered non-responsive
- 1.4.1.3 Bidders are to submit their document in the following formats "PDF, Excel, Picture format and zipped files only. Submissions made with different formats from the ones above and not supported by the SASSETA environment will be deemed non-responsive.
- 1.1.1.1 Bidders must not submit their responses via **Google drive** method as this option requires access via a Gmail account. If a Bidder's response is found to have been sent via Google drive during the evaluation period, it will be considered non-responsive.
- 1.1.1.2 Bidders are advised to double check their submission(s) before responding to the bid.

1.2 Closing date and time: **27 October 2025 @11h00**

1.3 LATE BIDS

- 1.3.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

1.4 NEGOTIATION

- 1.4.1 SASSETA has the right to enter into a negotiation with a prospective service provider.

- 1.4.2 A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties.

1.5 REASONS FOR REJECTION

- 1.5.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.
- 1.5.2 SASSETA shall disregard the bid of any bidder if that bidder, or any of its directors:
 - 1.5.2.1 have abused the Supply Chain Management systems of SASSETA.
 - 1.5.2.2 have committed proven fraud or any other improper conduct in relation to such systems.
 - 1.5.2.3 have failed to perform on a previous contract and proof exists.
 - 1.5.2.4 Such actions shall be communicated to the National Treasury.

2. TERMS OF REFERENCE

2.1 INTRODUCTION AND BACKGROUND

- 2.1.1 SASSETA is one of the twenty-one (21) Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's license has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.
- 2.1.2 SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). The SETA is accountable to the Board (Accounting authority) and the Department of Higher Education and Training (DHET) (Oversight authority).

2.2 SASSETA's Strategic Plan

- 2.2.1 SASSETA will further be guided by the **Medium-Term Development Plan (MTDP) 2024-2029**, emphasizing three core strategic priorities and the MTDP Outcomes to be supported by the PSET Sector:
- 2.2.1.1 **Inclusive Growth and Job Creation**
- Focus Areas:
 - Skills development for the Just Energy Transition (JET), including hydrogen economy and 4IR programmes.
 - Enhancing education-workplace relationships with workplace-based learning programmes.
 - Re-industrialisation and economic transformation through preferential procurement targeting women, youth, black-owned businesses, and SMMEs.
- 2.2.1.2 **Reducing Poverty and Tackling the High Cost of Living**
- Focus Areas:
 - Expanding access to higher education through infrastructure programs (e.g., new universities, TVET campuses, and community learning centres).
 - Enhancing education outcomes via NSFAS reforms and increasing graduate output in scarce skill areas.
 - Supporting social cohesion through initiatives like Civic Education and Gender-Based Violence awareness.
- 2.2.1.3 **Building a Capable, Ethical, and Developmental State**
- Focus Areas:
 - Legislative reviews to address ambiguities and enhance governance in public entities.
 - Improving higher education capacity by increasing PhD-qualified staff and supporting professional development for TVET and CET lecturers.

- 2.3 SASSETA will strive to improve access to occupations in high demand and priority skills aligned to supporting economic growth, the creation of employment and social development whilst seeking to address systemic considerations. This shall be advanced through the provision of job-oriented programmes to assist individuals in obtaining jobs and employment opportunities.

- 2.3.1 In a partial response to the above statement (i.e., Identification of occupations in high demand), the Skills Planning and Research department compiled the Research Agenda for the SETA as indicated in 2.4 below.

- 2.3.2 On the other hand, SASSETA utilises WSP data to analyse skills gaps (top-up skills) and occupational shortages (scarce skills). The WSP data is complemented with other sources of demographic, economic and labour market data. The said analyses inform the development of the Sectoral Priority Occupations and interventions (PIVOTAL) list. The PIVOTAL list is utilised to confirm the key skills development programmes of SASSETA as captured in the Annual Performance Plan (APP) and the Service Level Agreement (SLA) with the DHET.
- 2.3.3 The main purpose of this exercise is to improve productivity at different workplaces in the safety and security sector. Therefore, at the centre of the skills planning mechanism is data, including WSP data as indicated above. Should data be inaccurate, it will contribute towards the misinformation of the process of identifying and prioritising skills gaps and scarce skills in the sector

2.4 SASSETA's Research Agenda

- 2.4.1 The purpose of the Research Agenda is to support a sound skill planning to respond to the skills development needs of the Safety and Security Sector. The same document also sets out three (3) research priorities for the period 2025/26 – 2029/30 and these are:

2.4.1.1 **Updating the sub-sector and labour market research (2016/17-2020/21)**

This priority area is aimed at ensuring that sector needs are best catered for and to enable the SETA to address and align skills production for the sector. It builds on past knowledge of the subsector(s) reports which feeds into the annual update of the Sector Skills Plan (SSP), especially chapters on the Sector profile, Key skills issues as well as the Extent of skills mismatch to identify scarce and critical skills for the sector.

2.4.1.2 **Professionalisation and transformation of the safety and security sector**

This priority area seeks to contribute towards professionalization and transformation of the sector by providing knowledge or understanding to progressively implement skills development interventions that would contribute towards transformation and professionalization in the sector.

2.4.1.3 **Intensify the execution of evaluation (Impact and tracer) studies on skills development interventions funded by the SETA.**

This priority area focuses on studies that seek to reflect on and self- critique the efficacy and effectiveness, as well as the impact of skills development interventions implemented in advancing the mandate of the SETA, particularly in terms of professionalising and transforming the sector.

- 2.4.2 In essence, the SASSETA's Research Agenda has been developed to support and advance the SETA's sector skills plan (SSP) as well as to further inform sub-sector's constituencies about the SETA's research focus areas and priorities for the duration of the Research Agenda from 2025 to 2030.

- 2.4.3 Moreover, the White Paper for Post-School Education and Training notes that research should be at the centre of building a focussed and responsive post-schooling system. It also asserts that partnership with higher education institutions (HEI) and industry need to be established to support research on industry needs and skills planning. It is envisaged that the subsector research studies will support skills priority actions as identified in the SSP namely:
- 2.4.4 Strengthening partnership with sector training institutions and academies,
- 2.4.5 Advance transformation and professionalization of the sector,
- 2.4.6 Support information communication and technology (ICT) skills (including, but not limited to, the implications of industry 4.0 in the safety and security sector),
- 2.4.7 Improving technical and specialised skills, and
- 2.4.8 Contribute towards building an active citizenry.

2.5 PURPOSE

- 2.5.1 SASSETA requires the services of a suitable and experienced service provider from academia/ research institutes/ research consultancies to conduct a research study on the analysis of the economic contribution of the safety and security sector in South Africa: An Empirical Investigation.

2.6 RESEARCH OBJECTIVES

- 2.6.1 The main objective of this study is to estimate the economic contribution of the safety and security sector towards the total South African economy.
 - 2.6.1.1 The specific objectives include:
 - a) Estimate the economic contribution of the Private Security and Investigation Activities, and Legal Services sub-sectors to the South African economy.
 - b) Estimate the economic contribution of the public services sub-sectors (Policing, Correctional Services, Defence and Justice) to the South African economy.
 - c) Quantify the total economic contribution of the safety and security sector.
 - d) Forecast the economic contribution for the next 5 years in the safety and security sector.
 - e) Develop recommendations on how the SETA should support the sector to improve their productivity, competitiveness and innovation in this age of artificial intelligence (AI).

2.7 SCOPE OF WORK

- 2.7.1 Successful bidders will:
 - 2.7.1.1 Develop an econometric model and estimate the economic contribution of the of the safety and security sector to the South African economy.
 - 2.7.1.2 Develop credible and innovative method(s) to collect and clean data pertaining to the safety and security sector in South Africa.
 - 2.7.1.3 Prepare a research report with comprehensive and feasible recommendations.
 - 2.7.1.4 Prepare a presentation to management on the findings and recommendations of the research study.

2.8 REQUIRED DELIVERABLES

2.8.1 The required deliverables will include:

- 2.8.1.1 Inception report.
- 2.8.1.2 Data collection instrument and the data sets; and
- 2.8.1.3 Draft report,
- 2.8.1.4 Final report
- 2.8.1.5 Power-Point presentation

2.8.2 Inception report

2.8.2.1 Inception report will provide details about:

- 2.8.2.1.1 The research methodology to be utilised, including the main research methods, the sampling framework, proposed sources of data, procedures for data collection and analysis, and a draft (but detailed) table of contents; and
- 2.8.2.1.2 The proposed research tools will be discussed with and approved by the Research unit of SASSETA before data collection commences.

2.8.3 Data collection instruments and the data sets

2.8.3.1 An electronic copy of all data collection instruments, and the sector-specific data set will be submitted to SASSETA Research unit.

2.8.4 Draft report

2.8.4.1 The service provider to submit a draft report for SASSETA's review, and to incorporate suggestions and recommendations from SASSETA. Moreover, more rounds of revisions may be required before final versions of final report can be produced.

2.8.5 Final report

2.8.5.1 Final approved reports will be submitted as follows:

- 2.8.5.1.1 One (1) electronic copy in PDF; and
- 2.8.5.1.2 Ms Word format.

2.8.6 Power-Point presentation

2.8.6.1 Final presentations of the overall findings and recommendations

2.9 SKILLS AND EXPERIENCE OF THE BIDDING COMPANY AND THE TEAM MEMBERS PROPOSED FOR THE ASSIGNMENT

2.9.1 The Bidder to submit a research proposal demonstrating comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to be applied in line with the scope of work and cover the following topics:

- Detailed Research/evaluation designs and methodologies
- Detailed research/evaluation data analysis techniques/methods
- Preliminary literature review
- Deliverables
- Project plan which indicates activities and timeframes that adhere to the

- terms of reference, and
- Detailed risk and mitigation plan.

2.9.2 The Bidding Company to attach a minimum of three (3) signed reference letters demonstrating experience in conducting research studies from different clients and must be on a client's letterhead with contact details.

2.9.3 The Lead Researcher/Project Manager to have led and completed at least 3 research studies/reports for a client in any of the following fields: Econometrics, Economics, Statistics within the past 5 years. Comprehensive CV demonstrating this experience to be submitted.

2.9.4 The Lead Researcher/Project Manager to submit a minimum of three (3) references according to the 3 studies conducted and completed on 2.9.3

2.10 MANDATORY REQUIREMENTS

2.10.1 The successful bidder is required to:

2.10.1.1 Submit four (4) or more research outputs published on the DHET Accredited Journals for the team leader/research lead. Non submission of four (4) or more DHET accredited journal articles for the team leader/research lead will lead to automatic disqualification.

2.10.1.2 Submit a minimum of NQF level 9 qualification in Economics/Econometrics/Statistics for the Lead Researcher/Project Manager as indicated in SBD 3.3. International qualifications must be verified by SAQA and a copy of letters confirming verification to be attached with the proposal. Non submission of a minimum NQF Level 9 qualification in Economics/Econometrics/Statistics for the Lead Researcher / Project manager will lead to automatic disqualification.

2.11 TIMEFRAMES FOR DELIVERY OF THE WORK

2.11.1 The successful bidder is expected to deliver the study within a period of ten (10) months from the date of appointment

2.12 PRICING

2.12.1 Bidders are requested to provide an all-inclusive cost of this project assignment on SBD 3.3 of this tender.

2.13 ACCOUNTABILITY AND REPORTING

2.13.1 The service provider will report directly to the Skills Planning and Research Manager for the duration of the assignment.

2.14 SUBMISSION OF THE GENERAL CONDITIONS OF CONTRACT (GCC) (ANNEXURE A)

2.14.1 Bidders are requested to initial each page of the General Conditions of Contract (GCC) *annexure A* and submit their response to this Request for Proposal. The GCC will form part of the contract with the successful Bidder.

2.15 INTELLECTUAL PROPERTY

2.15.1 The service provider will be contracting with SASSETA. All data of this project, in whatever format raw or analysed, will be confidential information for utilisation by SASSETA. All information and documents received from

SASSETA is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the SLA. protection of personal information act.

2.16 PROTECTION OF PERSONAL INFORMATION ACT

2.16.1 All Service Providers are to take note of the implications of POPI Act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:

2.16.1.1 All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.

2.16.1.2 The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives Act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

2.16.1.3 SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of information provided.

2.16.1.4 SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

3. PROPOSED SELECTION CRITERIA

3.1. Compliance with minimum requirements

- 3.1.1. All bids duly lodged will be examined to determine compliance with bidding requirements and conditions.

3.2. Conditions for selection/short listing

- 3.2.1. All submissions will be evaluated as follows:

3.2.1.1. Phase 1 – Service Providers to:

- Submit their responses/bidding documents by the closing date and time. **Responses/bidding documents submitted after the date and time will be disqualified from further evaluation.**
- Submit four (4) or more research outputs published on the DHET Accredited Journals for the team leader/research lead. **Non submission of four (4) or more DHET accredited journal articles for the team leader/research lead will lead to automatic disqualification.**
- Submit a minimum of NQF level 9 qualification in Economics/Econometrics/Statistics for the Lead Researcher/Project Manager as indicated in SBD 3.3. International qualifications must be verified by SAQA and a copy of letters confirming verification to be attached with the proposal. **Non submission of a minimum NQF Level 9 qualification in Economics/Econometrics/Statistics for the Lead Researcher/Project Manager will lead to automatic disqualification.**
- Complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD 1, SBD 3.3, SBD 4, and SBD 6.1
- Be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with the proposal

3.2.1.2. Phase 2 – Functionality evaluation

- Bidders who meet the mandatory items requirements above will be evaluated on functionality requirements as per the table below:
- All acceptable proposals from phase 1 will be evaluated on a scale of 0 to 1 as follows:

0: Required document/item not submitted /Unacceptable, doesnot meet set criteria
1: Satisfactory should be adequate for stated element

FUNCTIONALITY EVALUATION

| ELEMENT | FUNCTIONALITY EVALUATION | | FUNCTIONALITY WEIGHT | TOTAL SCORE |
|---|---|--|----------------------|-------------|
| Proposed technical approach and research / evaluation methodology of the bidder | Rating out of1 | Evaluation criteria | | |
| The Bidder to submit a research proposal demonstrating comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to be applied in line with the scope of work and cover the following topics: <ul style="list-style-type: none">Detailed Research/evaluation designs and methodologiesDetailed research/evaluation data analysis techniques/methodsPreliminary literature reviewDeliverablesProject plan which indicates activities and timeframes that adhere to the terms of reference, andDetailed risk and mitigation plan. | Bidding Company to outline research/evaluation design and methodology tobe applied | | | |
| | 0 | Research / evaluation methodology and report writing details NOT included/ Short research / evaluation methodology and report writing details that do not relate to the full scope of work. | 40% | |
| | 1 | <ul style="list-style-type: none">Detailed Research/evaluation designs and methodologiesDetailed research/evaluation data analysis techniques/methodsPreliminary literature reviewDeliverablesProject plan which indicates activities and timeframes that adhere to the terms of reference, andDetailed risk and mitigation plan. | | |
| The Bidding Company to attach signed reference letters demonstrating experience in conducting research, evaluation, tracer and impact studies from different clients andmust be on a client’s letterhead with contact | 0 | The bidder has NOT attached or attached less than three (3) reference letters demonstrating experience in conducting research, evaluation, tracer and impact studies from different clients and must be on a client’s letterhead with contact details. | 10% | |

| | | | | |
|---|---|--|-------------|--|
| details. | 1 | The bidder has attached three (3) or more reference letters demonstrating experience in conducting research, evaluation, tracer and impact studies from different clients and must be on a client's letterhead with contact details. | | |
| The bidding Company to submit the CV of the Lead Researcher/Project Manager demonstrating 3 complete research studies/reports for a client in any of the following fields: Econometrics, Economics, Statistics within the past 5 years. | 0 | CV of the Lead Researcher/Project Manager is not attached or demonstrating less than 3 completed research studies/reports for a client in any of the following fields: Econometrics, Economics, Statistics within the past 5 years | 25% | |
| | 1 | CV of the Lead Researcher/Project Manager demonstrates three (3) or more completed research studies/reports for a client in any of the following fields: Econometrics, Economics, Statistics within the past 5 years | | |
| The bidding company to submit references according to the 3 studies conducted and completed by the proposed Lead Researcher/Project Manager as highlighted in the CV. | 0 | The bidder has NOT attached or attached less than three (less 3) reference letters. | 25% | |
| | 1 | The bidder has attached three (3) or more reference letters | | |
| Total | | | 100% | |

N/B: Bidders need to obtain 90% functionality for them to be evaluated further. Bidders who do not meet the required functionality threshold will be disqualified from further evaluation.

3.2.1.3. Phase 3 – Price and Specific Goals

The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:

| Evaluation Criterion on Price and Specific Goals | |
|--|------------|
| Relative competitiveness of proposed price | 80 |
| Specific Goals | 20 |
| TOTAL FOR PRICE AND PREFERENCE | 100 |

3.2.1.4. ADJUDICATION OF BID

- The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable and justifiable grounds or no award at all.

PART A - INVITATION TO BID

| | | | | | | |
|---|--|--|---|---|-----------------------------|--------------|
| YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY) | | | | | | |
| BID NUMBER: | RFP/SASSETA/25261120 | | CLOSING DATE: | 27 October 2025 | CLOSING TIME: | 11h00 |
| DESCRIPTION | Appointment of a service provider to conduct a research study on the analysis of the economic contribution of the safety and security sector in South Africa: An Empirical Investigation | | | | | |
| PROPOSALS TO BE EMAILED: | | | | | | |
| Proposals to be submitted electronically only via email to study@sasseta.org.za | | | | | | |
| BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO | | | TECHNICAL ENQUIRIES MAY BE DIRECTED TO: | | | |
| CONTACT PERSON | Ms. Lebo Hlombe | | CONTACT PERSON | Ms. Lebo Hlombe | | |
| E-MAIL ADDRESS | scm01@sasseta.org.za | | E-MAIL ADDRESS | scm01@sasseta.org.za | | |
| 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] Yes No | | B-BBEE STATUS LEVEL SWORN AFFIDAVIT | TICK APPLICABLE BOX] Yes 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] | | | | | | |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> [IF YES ENCLOSE PROOF] | | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | Yes No <input type="checkbox"/> <input type="checkbox"/> [IF YES, ANSWER PART B:3] | | |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS | | | | | | |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? | | | | YES | NO | |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? | | | | <input type="checkbox"/> YES | <input type="checkbox"/> NO | |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | | | | <input type="checkbox"/> YES | <input type="checkbox"/> NO | |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? | | | | <input type="checkbox"/> YES | <input type="checkbox"/> NO | |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? | | | | <input type="checkbox"/> YES | <input type="checkbox"/> 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, 2022, 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 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 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.

NAME OF SIGNATORY

SIGNATURE OF BIDDER:

N/B.: If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

N/B.: If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

PRICING SCHEDULE**(Professional Services)**

NAME OF BIDDER:

BID NO.: **RFP/SASSETA/25261120**CLOSING TIME: **11h00**CLOSING DATE: **27 October 2025**OFFER TO BE VALID FOR **120** DAYS FROM THE CLOSING DATE OF BID

| ITEM NO | DESCRIPTION **(ALL APPLICABLE TAXES INCLUDED) | BID PRICE IN RSA CURRENCY |
|------------|--|---------------------------|
|------------|--|---------------------------|

1. The accompanying information must be used for the formulation of proposals.
2. **Service Providers are requested to provide an all-inclusive cost of this project.**

| Delivery milestone | Cost inclusive of VAT (where applicable) |
|--|---|
| Inception Report | R |
| Data Analysis, findings, and recommendations | R |
| Literature | R |
| Draft Report | R |
| Final Report | R |
| Total Cost | R |

Bidders are to record the name and surname of the proposed team on this assignment and ensure that a comprehensive CV is member is attached to the proposal:

| NO. | ROLE IN THE TEAM | NAME AND SURNAME (Bidders to indicate <u>one</u> (1) name per role below. | IS THE CV ATTACHED (Circle the response below) |
|-----|-----------------------------------|--|---|
| 1. | 1 X Project manager/ Team Manager | | Yes/No |

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate)

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table.

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YE

S/NO

2.3.1 If so, furnish particulars:

.....

3. DECLARATION

I, the undersigned, (name).....in
submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium¹ will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

.....

1 Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE BID AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to quote:

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

The applicable preference point system for this quotation is the **80/20** preference point system.

- a) The lowest acceptable quotation will be used to determine the accurate system once quotations are received.

1.3 Points for this quotation (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

1.5 The maximum points for this quotation are allocated as follows:

| | POINTS |
|--|------------|
| PRICE | 80 |
| SPECIFIC GOALS | 20 |
| Total points for Price and SPECIFIC GOALS | 100 |

1.6 Failure on the part of a bidder to submit proof or documentation required in terms of this bid to claim points for specific goals with the quotation, will be interpreted to mean that preference points for specific goals are not claimed.

1.7 The organ of state reserves the right to request a bidder, either before a quotation is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

80/20

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

3.2 POINTS AWARDED FOR SPECIFIC GOALS

- a) In terms of Regulations 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the quotation.
- b) For the purposes of this quotation, the bidder will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this bid:

Table 1: Specific goals for the bidder and points claimed are indicated per the table below.

| The specific goals allocated points in terms of this bid | Number of points allocated (80/20 system) | <u>Bidders to record the number of points claimed in the rows below (80/20 system)</u> (To be completed by the bidder) |
|--|---|---|
| At least 100% Black People Ownership | 10.00 | |
| At least 30% Black Women Ownership | 5.00 | |
| At least 30% Black youth ownership | 5.00 | |
| Total | 20.00 | |

NB: Specific goals will not be rewarded to bidders who do not record their points in the table above

DECLARATION WITH REGARD TO COMPANY/FIRM

3.3 Name of company/firm.....

3.4 Company registration number:.....

3.5 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
☐ One-person business/sole propriety
☐ Close corporation
☐ Public Company
☐ Personal Liability Company
☐ (Pty) Limited
☐ Non-Profit Company
☐ State Owned Company[TICK APPLICABLE BOX]

3.6 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the quotation, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary

.....
SIGNATURE(S) OF BIDDER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Certified copy/ies of Identity documents of the Company Directors
- c) CSD report
- d) Shareholder Certificates

NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted).

BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

| NO. | DETAILS - Bidders are to set out their bid in the following format: | TICK BY BIDDER |
|-----|---|----------------|
| 1. | Part 1: Completed and signed the invitation to bid document (SBD 1) To be signed by a duly Authorised Delegate. | |
| 2. | Part 2: Completed and signed pricing schedule (SBD 3.3) To be signed by a duly Authorised Delegate. | |
| 3. | Part 3: Completed and signed the Bidder's disclosure (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document).</i> To be signed by a duly Authorised Delegate | |
| 4. | Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) To be signed by a duly Authorised Delegate. Not claiming points as per SBD 6.1 will lead to Specific Goals points not awarded | |
| 5. | Part 5: Submitted the General Conditions of Contract (initialed each page) | |
| 6. | Part 6: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration | |
| 7. | Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3 | |
| 8. | Part 8: Bidder submitted four (4) or more research outputs published on the DHET Accredited Journals for the team leader/research lead. Non submission of four (4) or more DHET accredited journal articles for the team leader/research lead will lead to automatic disqualification. | |
| 9. | Part 9: Bidder submitted a minimum of NQF level 9 qualification in Economics/Econometrics/Statistics for the Lead Researcher/ Project Manager as indicated in SBD 3.3. International qualifications must be verified by SAQA and a copy of letters confirming verification to be attached with the proposal. Non submission of a minimum NQF Level 9 qualification in Economics/Econometrics/Statistics for the Lead Researcher / Project manager will lead to automatic disqualification. | |
| 10. | Part 10: The Bidder to submit a research proposal demonstrating comprehensive understanding and experience in terms of approaches of undertaking research studies and outline research/ evaluation design and methodology to be applied in line with the scope of work | |
| 11. | Part 11: The Bidder attached signed reference letters demonstrating experience in conducting research, evaluation, tracer and impact studies from different clients and must be on a client's letterhead with contact details | |
| 12. | Part 12: The bidding Company submitted the CV of the Lead Researcher/Project Manager demonstrating 3 complete research studies/reports for a client in any of the following fields: Econometrics, Economics, Statistics within the past 5 years | |
| 13. | Part 13: The bidding company submitted references according to the 3 studies conducted and completed by the proposed Lead Researcher/Project Manager as highlighted in the CV. | |
| 20. | Part 20: Bidders to submit the following documents. Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded. | |
| | An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit. | |
| | Certified copy/ies of Identity documents of the Company Directors | |
| | CSD report | |

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