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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 23 - 2024/25

REQUEST FOR QUOTATIONS

TERMS OF REFERENCE TO CONDUCT RESEARCH ON TRADE UNIONS AS AN ETD SUBSECTOR FOR THE PURPOSE OF UPDATING THE 2025/26 SECTOR SKILLS PLAN (SSP)

1. INTRODUCTION

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No. 97 of 1998 to advance skills levels in accordance with the National Skills Development Plan (NSDP). The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce to benefit employers, workers and employees in the ETD sector.

In accordance with the Skills Development Act, 2008 section 10(a) each Sector Education and Training Authority (SETA) is required to develop a Sector Skills Plan (SSP) within the framework of the National Skills Development Strategy (NSDS) (now known as the Skills Development Plan (NSDP)). The SETAs are mandated to promote skills development in their designated sectors. This process involves sector planning research to ensure that public investments in skills development resonate with the needs of the SETA's constituencies and key government economic and social priorities. In this regard, the SETAs are tasked to develop and submit Sector Skills Plan (SSP) Annual Updates to the Department of Higher Education and Training (DHET).

The ETDP SETA reserves the right not to award the bid.

2. PURPOSE & OBJECTIVES

2.1. PURPOSE OF THE PROJECT

The ETDP SETA would like to contract a research partner to conduct research that will provide empirical data and labour market related information to inform the SSP update for 2025/26. The research partner appointed will be allocated the Trade Unions subsector.

2.2. OBJECTIVES

The main focus of this project is to gather, analyse and validate short, medium and long-term empirical data relating to the subsector profile, key skills issues, occupational shortages and skills gaps, subsector partnerships as well as skills priorities for the subsector across all Trade Unions.

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3. PROJECT SCOPE AND REQUIREMENTS

- 3.1. The scope of work is to conduct research for the Education, Training and Development (ETD) Sector Skills Plan (SSP) with specific focus on Trade Unions for the period 2024/2025. The main focus of this project is to gather, analyse and validate short, medium and long-term empirical data relating to the subsector profile, key skills issues, occupational shortages and skills gaps, subsector partnerships as well as skills priorities for the subsector across all Trade Unions. The research partner will be expected to follow the latest Department of Higher Education and Training SSP Framework and Guidelines in compiling this project report. The framework that will guide the contents of the research can be accessed on this link;

https://docs.google.com/presentation/d/1Hujg0clABj_wl56Oiw4DqPr7r3mUSkBL/edit?invite=CJKghtml&exids=71471469,71471463#slide=id.p1

- 3.2. The appointed research partner must have in place a capacity building plan to transfer skills to the ETDP SETA staff of the Research and Skills Planning Unit and this must form part of the project plan to be submitted.
- 3.3. The appointed research partner will report to the Senior Research Specialist of the ETDP SETA through the project plans by the partner. These project plans will indicate timelines, milestones and deliverables for the project. The draft project plans will be annexure to the Service Level Agreement (SLA) and form the basis for monitoring and reporting. The appointed research partner will work closely with the Research and Skills Planning Unit to collectively plan the methodology, activities, timelines, and deliverables. However, these must form part of the bidding by the research partner's bidding. The service provider should have the expertise in conducting research that will provide authentic data and labour market related information to inform the SSP update for 2025/26.
- 3.4. The service provide should have the expertise in conducting research that will provide authentic data and labour market related information to inform the SSP update for 2025/26.
- 3.5. Payment will be made in accordance with the agreed payment schedule contained in the SLA and must be denominated in South African Rand value. The researcher should submit a detailed **ALL-INCLUSIVE- Budget** for the project. No additional fees will be entertained thereafter.

4. DELIVERABLES

The key deliverables for this project are as follows:

- I. **Project Execution Plan (or Inception Report)**
 - A detailed work plan outlining the research methodological approach, data sources, resource tools and allocation, costs, timelines (realistic and with key milestones) and deliverables including provincial/institutional consultations.
- II. **Raw data report**
 - Raw data report showing emerging trends from the data collected

- Raw data report needs to show the methodology followed
- Raw data report needs to show the list of participants
- III. **A draft comprehensive SSP Report on Trade Unions written according to the latest SSP Framework from the DHET, which includes;**
 - Updated Trade Unions sections of the five (5) chapters of the SSP; Chapter 1= Sector Profile, Chapter 2 = Key Skills Change Drivers, Chapter 3 = Occupational Shortages and Skills Gaps, Chapter 4 = Sector Partnerships, and Chapter 5 = Skills Priority Actions
 - Stakeholder Consultations, In-depth interviews and Workshops with ETDP SETA stakeholders for the purpose of finalising the report.
 -
- IV. **Final Subsector Report on Trade Unions according to the SSP five (5) chapters.**
- V. **Infographic Statistical Analysis Report indicating skills/occupational shortages and skills supply within the trade unions subsector.**

5. DURATION OF THE AGREEMENT

The work is expected to be completed within the period of Twelve **(12) months** after the signing of the Service Level Agreement **(SLA)**.

6. COSTING MODEL (PRICING SCHEDULE)

The Bidder must provide a signed costing proposal on the company letterhead. The bidder's proposal costing should clearly indicate only the following cost:

NAME OF ORGANISATION:			
ITEM DESCRIPTION	Hourly Rate Inc VAT	Total Fee per day Inc VAT	Total Cost (Inc VAT)
Project Execution Plan (or Inception Report) (this should be 10% or less of the TOTAL COSTS VAT INCL) - A detailed work plan outlining the research methodological approach, data sources, resource tools and allocation, costs, timelines (realistic and with key milestones) and deliverables, including provincial/institutional consultations.			
Raw data report - Raw data report showing emerging trends from the data collected - Raw data report needs to show the methodology followed - Raw data report needs to show the list of participants			
Draft Report of the key findings and conclusions , which includes; - Updated Trade Unions sections of the five (5) chapters of the SSP: Chapter 1= Sector Profile, Chapter 2 = Key Skills Change Drivers, Chapter 3 = Occupational Shortages and Skills Gaps, Chapter 4 = Sector Partnerships, and Chapter 5 = Skills Priority Actions - Stakeholder Consultations, In-depth interviews and Workshops with ETDP SETA stakeholders for the purpose of finalising the report.			
Final Subsector Report on Trade Unions (with proof of language editing) PowerPoint presentation			
Infographic Statistical Analysis Report indicating skills/occupational shortages and skills supply within the Trade Unions			
SUB-TOTAL			
VAT @ 15%			
TOTAL COSTS VAT INCL			

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NAME OF BIDDER: _____

POSITION/ ROLE: _____

SIGNATURE: _____

All pricing shall be in South African Rand (ZAR). All project milestones with costing should be listed on the pricing schedule.

7. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the Preferential Procurement Policy Framework Act, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2022. The evaluation will be guided by ETDP SETA procurement policy.

Note: Folder A (USB) must have documents for Stage 1

7.1. STAGE 1 [Folder A (USB)]

In this stage, the evaluation of bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid document.

- a. The minimum qualifying score for functionality will be **70 points** out of hundred **(100) points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- b. Only bids that achieved the minimum qualifying score/ percentage for functionality will be evaluated further in accordance with the **80/20 preference point systems prescribed in Preferential Procurement Regulations 5 and 6.**

The evaluation criteria for functionality will be as below:

NO.	CRITERIA	POINTS
1.	Company experience and reference letters: Company's proof of conducting research in ETD and or related field. <i>(Provide signed proof on the referee's company letterhead)</i> 1.1. The cumulative experience (from the above letters): 20 ○ 5 years and above = 20 points ○ 3 - 4 years = 10 points ○ Less than 3 years = 0 points *[Each reference must clearly indicate; • the name of the bidder and the project • objectives of the project (nature of the project) • duration of the project • recommendation and contact details of the referee as well as proof of completed project(s) and • must be signed. NB: If any of the above information is omitted/missing, it will lead to the reference letter(s) not being allocated points. *NB: For Research Providers who have conducted research for the ETDP SETA in the period 2019-2024 need to submit the reference letters from the ETDP SETA as part of their reference letters, failure to do so will lead to a score of zero under the References letters and Experience criteria.	20
2.	Capacity to deliver: Profile of key staff and CV's to be attached. 2.1. Project Team Structure (20) The project team structure should comprise of but not limited to project manager (3 points), senior researcher (3 points), project admin (2 points), field workers (junior researchers) (6 points, 2 points for each field worker), data analysts (3 points), report writer/s (3 points). ○ Project team structure with all positions above = 20 points Points will be allocated according to the positions provided and their assigned points. NB: Project Team structure with no names and roles of personnel will not be considered. 2.2. Relevant qualification of Project Manager (attach certified copies of Qualifications) (10) Master's degree Qualification is a minimum requirement for the Project Manager	50

	○ <i>Master's degree Qualification or above = 10 points</i> ○ <i>Qualification below Master's degree = 0 points</i> 2.3. A plan on how the bidder will access information from Trade Unions (10) ○ <i>A comprehensive plan on how the bidder will access information of Trade Unions indicating in detail three alternative methods where one method is not yielding results = 10 points</i> ○ <i>A comprehensive plan on how the bidder will access information of Trade Unions indicating two alternative methods where one method is not yielding results = 5 points</i> ○ <i>A comprehensive plan on how the bidder will access information of Trade Unions indicating less than two alternative methods where one method is not yielding results = 0 points</i> 2.4. Relevant experience of Project Manager in managing similar projects (Research within the ETD sector) (Attach CV) (10) ○ <i>5 years and above = 10 points</i> ○ <i>3- 4 years = 5 points</i> ○ <i>1 -2 years = 3 points</i> ○ <i>Below 1 year = 0 points</i> NB: The initial project team need not change during the course of the project without prior approval of the ETDP SETA Research Unit.	
3.	Research Project Plan (30) A realistic and detailed project plan needs to be provided. The research project plan needs to indicate the following sections: (a) Research process and methods (indicating, among other sections; the research participants key informants from various relevant organisations (5 points), (b) Timelines (within the prescribed period of 12 months) (5 points), (c) Plan for skills transfer to the ETDPSETA Research team (5 points), (d) Detailed data collection plan and list of data sources (5 points), (e) reports editing, infographics and proof-reading plan (5 points), (f) All-inclusive (VAT) detailed budget showing items (5 points). ○ <i>Six of the above-mentioned deliverables out of the plan = 30 points</i> ○ <i>Points will be allocated according to the items provided and their assigned points.</i> *NB: ETDP SETA will not share WSP data with providers, the appointed provider	30

	<i>needs to have contacts and connections in the subsector to allow them to gain easy access for data collection purposes.</i> <i>*NB: All five federations need to form part of the participants for the study.</i>	
TOTAL		100

Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to validate the information submitted.

Points will be awarded on a sliding scale only where indicated.

Please take note of the value and scoring point system of your bid.

7.2. STAGE 2 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. Submit a "Unique security personal identification number (PIN) issued by SARS" **which the SETA will use to verify the bidder's tax matters prior to the award**
- c. Invitation to Bid - **SBD1**
- d. Declaration of Interest – **SBD 4 (New)**
- e. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 - **SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals**
- f. B-BBEE certificate or sworn affidavit (**If claiming preferential points) – this will be used to verify points to be allocated for specific goals.**

80/20 preference point system shall be applicable as follows:

- | | |
|--------------------------------|-----------|
| ✓ Price | 80 |
| ✓ Allocation of specific goals | 20 |

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers.

8. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserves the right to negotiate the bidder's price.
3. ETDP SETA reserves the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned or submitted by facsimile will **NOT** be accepted.
5. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals.
6. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less to be used to verify eligibility for allocation of points for specific goals.
7. A Qualifying Small Enterprise (QSE) is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million and level of black ownership** or a B-BBEE level verification certificate to be used to verify eligibility for allocation of points for specific goals.
8. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that no points will be allocated for specific goals.
10. Bids submitted are to hold good for a period of 90 days.
11. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
12. All suppliers must be registered on the **Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.
14. The successful research chair **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.
15. The ETDP SETA remains the sole owner and custodian of all content, material, or any other form of development. No information of or on behalf of the ETDP SET may be shared, during the duration or after the closing period of the project. It remains the responsibility of the appointed service provider to hand over all material to the ETDP SETA. Should a service provider wish to have the ETDP SETA as a referral, permission for this must be sought.

9. BID DOCUMENTS/ PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Open RFQs as from **12h00** on **07 June 2024**.

Bidders must submit technical and financial proposals in **one (1) USB** clearly marked “Folder A-Technical Proposal” and “Folder B- Financial Proposal”.

Folder B - (Financial Proposal) Costing Model (*Price must be final, include VAT and signed*), Submit a “Unique security personal identification number (PIN) issued by SARS” **which the SETA will use to verify the bidder’s tax matters prior to the award**, Invitation to Bid - **SBD1**, Declaration of Interest – **SBD 4 (New)**, Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 -**SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals** and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – **this will be used to verify points to be allocated for specific goals**.

All Bids/Proposals (completed in [one (1) USB] must be **courier or hand delivered** to:

The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Ghandi Square
Johannesburg South - CBD
2091

OR

Sent via email to etdpsetarfq@etdpseta.org.za

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 24 June 2024**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 24 June 2024**.

11. CONTACT PERSON

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. **ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID.** All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain: Email: etdpsetarfq@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.