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Education, Training and Development Practices Sector Education and Training Authority

BID NO: SCMU NO: 11 - 2021/22

REQUEST FOR BIDS

TERMS OF REFERENCE FOR IMPLEMENTATION, SUPPORT AND MAINTENANCE OF THE ETDP SETA INFORMATION MANAGEMENT SYSTEM

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 2030. The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce in order to benefit employers and employees in the ETD sector.

The ETDP SETA will host a **COMPULSORY** virtual briefing session for **BID NO: SCMU 11 - 2021/22 - Implementation, support and maintenance of the Information Management System on 29 September 2021 at 11h00**. Interested members must please communicate their interest to join in the session, **before 27 September 2021**. To attend and get access to the session, please email: TienieJ@etdpseta.org.za with your Name, Surname, Company Name, Email address and Cellphone Number. Access details **will only be shared** with those that confirmed. Please do not forward the link further. We thank you for your cooperation.

2. PURPOSE

2.1. PURPOSE OF THE PROJECT

The ETDP SETA is looking for a competent and experienced service provider to implement, support and maintain a secure and reliable Information Management System (IMS). The system must automate submissions of Annexure 2 Workplace Skills Plans and Reporting (WSPR), Education Training and Development Quality Assurance (ETDQA) processes, administration of skills development intervention and processing of mandatory grants. The service provider must ensure system compliance with relevant legislations such as the PoPI Act of 2013 and must have an up to date business continuity and disaster recovery plans.

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3. OVERVIEW

The ETDP SETA is in the process of digitising its business processes to improve organisational efficacy. It is expected that the system will streamline the ETDP SETA operations, eliminate duplication and speed up turnaround times in responding to stakeholder requests. The system will administer huge volumes of personal data, thus the system must comply with PoPI Act of 2013.

The ETDP SETA is comprised of a Head Office situated in Johannesburg and provincial offices in all nine provinces. The total staff compliment is ±150. The ETDP SETA Information Management System will be used by both internal and external stakeholders.

4. SCOPE OF WORK

The successful bidder will be required to implement, support and maintain the ETDP SETA Information Management system which covers the following areas:

Functional Area	Scope
Education Training & Development Quality Assurance (ETDQA)	Assessor/ Moderator registration Skills development provider accreditation (historically registered qualifications) Assessment management (internal, external and endorsements) Certification Workplace approval Assessment centre accreditation Skills development provider accreditation (occupational qualifications) External integrated summative assessments National Learner Record Database (NLRD) & Quality Council for Trades & Occupations (QCTO) learner record upload compliance Workplace based learning programme agreement registration
Workplace Skills Plan & Reporting (WSPR)	SDF registration and approval process WSPR submissions WSPR Assessments WSPR Reporting
Grants and Levies	Levy processing Mandatory Grants processing
Skills Development Interventions (SDI)	Bursary applications and approvals Learner enrolments, renewals and completions to structured skills development programmes (workplace based learning

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	programmes) Learner enrolments and completions to non-structured skills development programmes
Performance Information Management Monitoring Evaluation & Reporting	Capture Annual Performance Plan Sector Education Training Management Information System (SETMIS) reporting Department of Higher Education and Training (DHET) Service Level Agreement reporting (SLA)
Contract management	Register contracts/projects Link beneficiaries to contracts/projects Processing of grants/payments per beneficiary
Other Functions	Integration with other systems (ETDP SETA Management Information System (MIS – Corporater() Finance (Microsoft Dynamics GP), SAGE VIP) Data migration Dashboard and reporting User training

5. FUNCTIONAL REQUIREMENTS

5.1 General System Requirements

- Secure, cloud-based and workflow driven.
- All system functions must be access rights driven, based on individual users and user groups.
- The system shall provide highly intuitive, comprehensive, user definable and user configurable dashboards with drill down capabilities for ease of access to information
- The system must be mobile and tablet friendly
- The system must be accessible to designated SETA users and external stakeholders irrespective of their location.
- The system must have a capability to automatically send communication, emails and smses, to the stakeholders at various stages of the work flow, based on user determined parameters and templates.
- The system must provide user controlled access to external stakeholders such as Skills Development Facilitators, skills development providers, assessors, moderators, etc.
- The system must enable access to the public to pertinent information
- The system must generate access reports on a regular, user defined, period and send these to predefined persons for monitoring and verification.
- The system must have reporting and analytic capabilities

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- The system must enable use of electronic signatures.
- The system must provide the capability to log and track queries both from the external and internal stakeholders
- The system must enable upload of portfolio of evidence at any stage in the system and upload of large data files
- Provide user manuals in both video and scripted form for all modules
- The system must provide means of integrating / interfacing with other systems such as MIS, VIP Payroll and Microsoft Dynamics GP.
- The system must be compliant with general requirements issued from time to time by external stakeholders e.g. DHET, SAQA, QCTO etc
- The system shall have the capability to manage and utilise full geospatial information pertaining to South Africa right down to the electoral wards level, and this will be utilised in the reporting process where required.

5.2 ETDQA

- The system must be able to process online applications for:
 - Assessors registration
 - Moderators registration
 - Accreditation of skills development providers against historically registered qualifications
 - Accreditation of Skills development provider accreditation (occupational qualifications)
 - Assessments centres for occupational qualifications
 - Workplace approval
- The system must be able to process online assessments, verification and endorsement of assessment results
- The system must be able to enable the conduct of online external integrated summative assessments against occupational qualifications
- The system must enable successful submission of learner records to SAQA and QCTO in compliance with the applicable reporting requirements
- The system must enable auto generation of learner certificates and issuance of unique identification numbers

5.3 WSPR

- The system must be able to process online applications for:
 - Skills Development Facilitators registration and approval
 - Employer registration and approval
- The system must enable online capturing and submission of Annexure 2 WSPRs by both levy and non-levy paying constituent employers and/or their representatives.
- The system must be able to provide for a three-stage assessment process of submitted WSPR (evaluate, recommend for approval and approval)
- The system must be able to provide baseline analysis of WSPR data and export to excel

5.4 SDI

- The system must be able to process online applications for:
 - Bursaries
 - Skills development programmes (structured and unstructured)
 - Workplace based learning programmes
- The system must enable processing of multiple applications by a single entity
- The system must allow capturing of learner information by the beneficiaries themselves and/or designated ETDP SETA officials and upload of relevant portfolio of evidence
- The system must enable update of personal details

5.5 Performance Information Management Monitoring Evaluation and Reporting

- The system enable capturing of the ETDP SETA Annual Performance Plan (APP) and its budget
- The system should enable allocation of APP targets to various implementing business units
- Access for implementing units should be limited to programmes and projects relevant to their scope of allocation
- The system must enable capturing of APP projects (skills development interventions identified for implementation in a respective financial year) and linking of these to beneficiaries
- The system must enable successful submission of learner records to DHET in compliance with the SETMIS and other reporting requirements
- The system should be able to have project site visiting monitoring functionality /feature linked to the contractual payment terms
- The system should be enable monitoring to be done at a project level and allow the uploading of applicable evidence
- The system should allow the capturing of information such as project monitor¹'s personal details, date on which the monitoring is done, reasons for monitoring, findings/outcomes, recommendations, etc.
- The system should enable the project monitor to send an email notifications/alerts to the designated ETDP SETA official
- The system should be able to generate the outcome of the monitoring through the project site monitoring reports throughout the project life span

5.6 Contract management

- The system should allow for project creation
 - Linking a project to the uploaded APP as per the target distribution to the implementing business unit
- The system should allow for the automatic allocation of grants to the project
 - Reconciling the allocated budget for the beneficiaries linked to the project
- The system should allow for processing of grants/payments per beneficiary
- The system should enable designated ETDP SETA officials to do the necessary validation and approvals of the captured information at various levels and based on the delegation of authority
- The system should allow uploading of applicable evidence as proof of delivery
- The system should allow for the automatic termination of the projects and beneficiaries based on the duration of the respective project

¹ ~~Project monitors could be Provincial Skills Advisors, Project Leaders and Project Coordinators~~

- The system should allow for the automatic generation of email notifications/alerts to the implementing business unit about certain project milestones for actioning.
- The system should allow for variance report generation in various formats
 - Excel Version
 - Word Version
 - Dashboard and graphs
- The system should allow for easy drill down options to generate variance reports

5.7 Grants & Levies

- The system must be able to process levies from a levy file received from DHET and split amounts into discretionary grants (49,5%), mandatory grants (20%), Admin (10%) and QCTO (0,5%)
- The system must be able to extract data from a zipped file and apportion it accordingly
- The system must enable the flow of the Mandatory Grants payment process that is triggered by the approval of the Annexure 2 Workplace Skills Plan
- The system must be able to integrate with other systems such as the Finance system for payment of mandatory grants
- The system must calculate the amounts due to respective employers and generate a schedule of disbursements based on the parameters set by the SETA.
- The system should generate remittance advice and make it accessible to Levy payers

5.8 Collaboration and Integration

- Seamless integration with other systems such as Finance (MS Dynamics GP), MIS/DSS, SETMIS, NLRD and DPME's eQPRS for performance monitoring and reporting
- Seamless integration with the electronic document management system (EDMS) for portfolio of evidence (PoE).
- The system must be adaptable with other systems used by most of our constituencies such as HEIs
- Ability to integrate with Active directory for user logins
- Ability to integrate with other system through Application Programming Interfaces (API) e.g. University systems for purposes of collecting data

5.9 Dashboard and reporting

- The system must provide highly intuitive dashboards for ease of access to information
- The dashboards must be accessible from mobile devices such as tablets and smartphones.
- The system must produce various forms of reports required for reporting by the different stakeholders.
- The system must enforce the necessary checks such as segregation of duties on capturing and verification to ensure information accuracy. This includes but not limited to enforcing PoE.



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5.10 Data Migration

- Migration of legacy data from legacy systems; i.e. Indiciu System amongst others must be executed successfully
- The service provider must develop comprehensive data migration plans and handling of exception reports to ensure successful migration of all organisational data

The ETDP SETA maintains the following data in the Indiciu System:

Module	Type of data
ETDQA	Skills Development provider information Learner information Assessor and moderator information Qualifications and Unit Standards Learner certification information
WSPR	Persons information for SDFs Employer information Workplace skills plans and reports
SDI	Learner information Employer information where applicable Training provider information Skills development intervention type Uploaded scanned documents e.g. copy of IDs Qualifications and Unit Standards

5.11 System User Training

- Upon successful deployment of the system, all system users (internal and external) must be trained
- Ongoing training as and when new functionality is deployed
- Annual refresher training
- Train the trainer processes must be provided
- Internal system administrators training must be provided.
- Develop user manuals (video and scripted) which must be accessible to both ETDP SETA internal and external system users

5.12 Support and Maintenance

- Support and proactive maintenance of the system will be required for the duration of the contract.

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5.13 Compliance and security

- Reporting requirements as issued from time-to-time by the Department of Planning, Monitoring and Evaluation (DPME), the Department of Higher Education and Training (DHET), SAQA, QCTO must be provided for.
- To guarantee security on the system, patches and security updates must be provided as issued from time-to-time.
- The system must generate audit trails
- The system must further comply with any other applicable legislative imperatives, prescripts, policy, and Standard Operating Procedures such as POPIA
- The service provider must ensure that business continuity and disaster recovery processes are in place and tested on a regular basis.

6. PROJECT DELIVERABLES

6.1 Solution Proposal

A detailed solution proposal addressing all the functional requirements in section 5 of this terms of reference, implementation thereof, approach, support and maintenance. The solution proposal should also clearly cover the following areas:

- Integration - submit a process flow of how the system will integrate with all other systems
- Dashboard & reporting - submit screen dumps of the dashboards and reports of the system
- Training – provide a training plan addressing all different stakeholders
- Compliance - the service provider to outline the measures put in place to ensure compliance with the Protection of Personal Information Act of 2013
- Support and maintenance - submit a support and maintenance plan

6.2 Project Plan

A detailed project execution plan with clear milestones, resources tools and allocation, timelines and deliverables, handholding, and support and maintenance, *inter alia*, must be submitted with the bid.

7. DURATION OF THE AGREEMENT

It is expected that the duration of the agreement will be for a period of **5 years (60 months)**; including project initiation, implementation, support and maintenance. The ETDP SETA reserves the right to further extend the contract with the appointed service provider based on satisfactory performance and in line with the needs of the business.

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8. COSTING MODEL (PRICING SCHEDULE)

All pricing shall be in South African Rand (ZAR). All project milestones must be included in the final price. Costing should be inclusive of VAT and annual escalation fees if necessary.

THIS COSTING MODEL MUST NOT BE MODIFIED AT ALL AND IF RETYPED ALL LINE ITEMS IN ORDER AS STATED BELOW TO BE INCLUDED.

Item no.	Description	Costing (Excl. VAT)
1	Year 1	
1.1	- License / subscription	
1.2	- System development and/or customization and deployment (<i>to respond to section 5 of the terms of reference</i>)	
1.3	- Data migration costs (<i>refer to section 5.8</i>)	
1.4	- Integration (<i>refer to section 5.6</i>)	
1.5	- 10 x 4hr virtual training sessions of internal staff	
1.6	- 10 x 4hr virtual training sessions of external stakeholders	
1.7	- Professional Services including maintenance and support (<i>Please give detail</i>)	
2	Year 2	
2.1	- License / subscription	
2.2	- Additional Development costs (<i>20% of annual subscription fee</i>)	
2.3	- 4 x 4hr virtual training sessions	
2.4	- Professional Services including maintenance and support (<i>Please give detail</i>)	
3	Year 3	
3.1	- License / subscription	
3.2	- Additional Development costs (<i>20% of annual subscription fee</i>)	
3.3	- 4 x 4hr virtual training sessions	
3.4	- Professional Services including maintenance and support (<i>Please give detail</i>)	
4	Year 4	
4.1	- License / subscription	

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Signature of Bidder

e

B.

9. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2017. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USB) must have documents for Stage 1 and Stage 2

9.1 STAGE 1 (Folder A) [USB]

Bidders will be evaluated on the submission of the **requested mandatory documents**.

9.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. Invitation to Bid - **SBD1**
2. Declaration of Interest – **SBD 4**
3. Declaration of Bidder's Past Supply Chain Practices – **SBD 8**
4. Certificate of Independent Bid Determination – **SBD 9**
5. Proof of product / system ownership or Original Equipment Manufacturer (OEM) accreditation (*A letter on the product owner's company letterhead or a partnership certificate will suffice*)
6. **Annexure A** - Bidders must complete the form fully and sign

NB: Failure to submit any of the above-requested mandatory documents and/or incomplete Annexure A will lead to a disqualification.

9.2 STAGE 2 (Folder A) [USB]

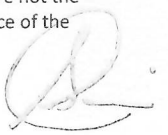
The evaluation of this bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid documents.

- 9.2.1 The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
- 9.2.2 Only bids that achieved the minimum qualifying score 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	EVALUATION CRITERIA	POINTS
1.	Business Experience: The Service Provider must provide proof of similar experience on reference letters. The reference letters must place special emphasis on the following key aspects: a) Name of the Project. b) Duration of the project. c) Recommendation by the Referee. NB: A Referee's Letter that DOES NOT comply with requirements (a) - (c) above, shall not be considered. 1.1. References: 5 Three (3) or more reference letters submitted = 5 points Two (2) references letters submitted = 3 points One (1) reference letter submitted = 1 points 1.2. Experience: 15 (this will be derived from the reference letters) - o 5 years and above = 15 - o 3- 4 years = 10 - o 1 -2 years = 5 - o Below 1 = 0 NB: Reference letters must be on referee's company letter head, signed and dated otherwise they cannot be considered.	20
2.	Project Deliverables 2.1 A solution proposal detailing the work to be implemented against these terms of reference. The proposal should respond to all items listed in section 5 of the terms of reference and must correspond with index references provided in Annexure A (30) - o Solution Proposal addresses all the requirements = 100% (30) - o Solution Proposal addresses most of the requirements = 90-99% (20) - o Solution Proposal addresses some of the requirements = 80-89% (10) - o Solution Proposal addresses below 80% of the requirements = (0) N/B Any Solution Proposal with index references that do not correspond with Annexure A will not be considered 2.2 Milestone based project implementation plan for all items listed in section 5	60

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	which must be commissioned within 6 months from date of signing the service level agreement (30) ○ Detailed milestone based project plan executed within 6 months = 30 ○ High level project plan executed with 6 months = 15 ○ No project plan or project plan exceeding 6 months = 0	
3.	Capacity to deliver: Profile of key staff and CV's to be attached. 3.1 Project Team Structure (5) The project team structure should comprise of but not limited to project manager, project admin, lead software developer, business analyst, system analyst, consultants, change agents with names of personnel and clear roles and responsibilities NB: Project Team structure with no names and roles of personnel will not be considered 3.2 Relevant experience of Project Manager in managing similar projects (Attach CV- the CV must clearly indicate the projects, date/period of implementation, names of clients and client contact details) (5) ○ 5 years and above = 5 ○ 3- 4 years = 3 ○ 1 -2 years = 1 ○ Below 1 = 0 3.3 Relevant experience of Lead Software Developer (Attach CV - the CV must clearly indicate the projects, date/period of implementation, names of clients and client contact details) (5) ○ 5 years and above = 5 ○ 3- 4 years = 3 ○ 1 -2 years = 1 ○ Below 1 = 0 3.4 Relevant experience of the Systems Analyst (Attach CV - the CV must clearly indicate the projects, date/period of implementation, names of clients and client contact details) (5) ○ 5 years and above = 5 ○ 3- 4 years = 3 ○ 1 -2 years = 1 ○ Below 1 = 0	20
TOTAL		100

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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.

9.3 STAGE 3 (Folder B) [USB]

PRICING SCHEDULE DOCUMENTS (Folder B) [USB]

- a. Price Proposal— **Price must be final, include VAT [(if registered for VAT), signed.**
- b. Valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS
- c. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (If claiming preferential points)**
- d. B-BBEE certificate or sworn affidavit **(If claiming preferential points)**

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

✓ Price	80
✓ B-BBEE status level of contributor	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.

NB: PLEASE NOTE THAT INCLUSION OF THE FINANCIAL PROPOSAL IN FOLDER A WILL LEAD TO DISQUALIFICATION.



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10. 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 reserve 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 and/or email 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 eligible for empowerment points.
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 and level of black ownership to claim points.
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 claim points as prescribed.
8. **B-BBEE Certificates obtained from Accountants/ Auditors after 31 December 2016 will no longer be accepted.**
9. 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 eligible for empowerment points. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
10. 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 preference points for B-BBEE status level of contribution are not claimed.
11. Bids submitted are to hold good for a period of 90 days.
12. 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.
13. 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.
14. Companies that are in the process of **de-registration in the CIPC** will not be considered.
15. The successful service provider **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.

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11. 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 Tenders as from **12h00** on **17 September 2021**.

Bidders must submit technical and financial proposals in **two separate USBs ONLY** clearly marked "Folder A-Technical Proposal" and "Folder B- Financial Proposal".

NB: PAPER BASED PROPOSALS and CDs WILL NOT BE ACCEPTED AND WILL LEAD TO DISQUALIFICATION AND ELIMINATION OF YOUR BID FROM EVALUATION!

Folder B must include the **complete and signed costing model and Valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS and must be in SARS letterhead** (Mandatory) & fully completed SBD 6.1 form or B-BBE Certificate or a signed Sworn Affidavit (if claiming preferential points).

The financial proposal **will only be opened** should the technical proposal be found acceptable.

All Bids/Proposals **must be hand/ courier delivered to:**

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

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of 11h00 on **11 October 2021**.

No late submission will be accepted!

12. CLOSING DATE

All proposals should reach the ETDP SETA Offices on or before 11h00 on **11 October 2021**.

13. 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 Management: Email: tenderers@etdpseta.org.za

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