

**REQUEST FOR QUOTATION (RFQ)**

**APPOINTMENT OF A SERVICE PROVIDER TO SUPPLY AND DELIVER BRANDED PROMOTIONAL ITEMS/MATERIAL TO INSETA**

<b>RFQ NUMBER</b>	<b>REQ/INS/2022/01062</b>
<b>RFQ ISSUE DATE</b>	<b>21 SEPTEMBER 2022</b>
<b>BRIEFING SESSION</b>	<b>N/A</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF A SERVICE PROVIDER TO SUPPLY AND DELIVER BRANDED PROMOTIONAL ITEMS/MATERIAL</b>
<b>CLOSING DATE &amp; TIME</b>	<b>26 SEPTEMBER 2022 @ 11:00 MONDAY</b>
<b>SUBMISSIONS</b>	<a href="mailto:rfqs@inseta.org.za">rfqs@inseta.org.za</a>

**Bidders must submit responses via e-mail at: [rfqs@inseta.org.za](mailto:rfqs@inseta.org.za), before the stipulated date and time. For any queries or questions, please use above mentioned email address.**

The INSETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

## DETAILED SPECIFICATION

### APPOINTMENT OF A SERVICE PROVIDER TO SUPPLY AND DELIVER BRANDED PROMOTIONAL ITEMS / MATERIAL TO INSETA.

#### 1. BACKGROUND

The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the PFMA and was established in March 2000. The INSETA must, in accordance with any prescribed requirements perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), and any other relevant legislation and the Constitution.

The objective of this request is to appoint a competent service provider to supply and deliver branded promotional Items/materials for INSETA.

#### 2. PURPOSE

2.1 The purpose of this RFQ is to invite a qualified and experienced service provider to supply and deliver branded promotional Items/materials and intends in appointing service providers to supply and deliver branded promotional Items/materials to INSETA.

#### 2.2 SCOPE OF WORK

The following branded promotional Items/materials are to be provided to INSETA.

**INSETA to provide a Corporate Identity Manual to awarded bidder**

##### 2.2.1 Branded Coffee Mugs

- Colour – White
- **Quantity – 300**
- Branding – INSETA full logo in full colours (Screen printing/ similar)
- Size – 9.8 (h) 330ml
- Ceramic
- Packaged in a box



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### 3. ADMINISTRATION PROCESS

The SBD forms must be fully completed, signed by the authorised company representative.

- 3.1 Preference Points Claim Form (SBD 6.1)
- 3.2 Standard Bidding Document (SBD 6.2). 100% South African -local content.
- 3.3 Bidder Disclosure (SBD 4)
- 3.4 General Conditions of Contract (GCC) **Bidder/s must initial all pages of GCC.**
- 3.5 Bidder must submit a formal quotation on a company letterhead and completed pricing schedule.

**Non – compliance in returning above mentioned documents, will deem the bid submission as non-responsive.**

### 4. PREQUALIFICATION CRITERIA

- 4.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**)
- 4.2 Bidders are required to *initial each page and sign the RFQ documents and GCC.*

**Note: noncompliance with the prequalification criteria will result in automatic disqualification.**

### 5. MANDATORY CRITERIA

- 5.1 Bidders to provide a company profile
- 5.2 Bidder must submit **two (2)** reference letters that indicate similar work conducted in supply and delivery of promotional items/material within the **last three (3) years** with contactable references, company client letterhead, dated, and signed.
- 5.3 **Shortlisted bidders will be required to submit samples of goods before recommendation for an award within 48 hours of receipt of the RFQ – for approval.**
- 5.4 **Confirmation of delivery 1<sup>st</sup> week of October 2022.**

**Note: noncompliance with the prequalification criteria will result in automatic disqualification**

### 6. COSTING

- 6.1 The quotation must reflect a detailed cost breakdown indicating the following:

#### PRICING SCHEDULE

Items	Description Unit	Quantity	Unit Price	Total Cost
1.	Branded Coffee Mugs	300		R
2.	Delivery to INSETA	1		R
<b>Total Excluding VAT</b>				<b>R</b>
<b>VAT @ 15%</b>				<b>R</b>
<b>Total Including VAT</b>				<b>R</b>

**Board Members:** Mr. J.S. Ngubane (Chairperson), Ms. V. Pearson (Business), Ms. L. van der Merwe (Business), Ms. R.G. Govender (Business), Ms. P. Mendes (Business), Ms. Z. Motsa (Business), Mr. M. Soobramoney (Labour), Mr. J.J.M. Mabena (Labour), Ms. S.A. Anders (Labour), Mr. C.B. Botha (Labour), Ms. S.T. Dinyake (Labour), Ms. N.B. Jonas (Labour)  
Ms. F. Mabaso (Government), Mr. S.M. Mpuru (Community Organisation)

**CEO: G. Mkhize**

## 7. PRICING CONSIDERATIONS:

- 7.1 Service providers must ensure that the price quotations are inclusive of all applicable taxes **(including VAT)**. Costing must comprise all the relevant services proposed in the bidder submission.
- 7.2 The bidder will be required to accept a purchase order.
- 7.3 Compliance with the general conditions of the contract.

## 8. CONTRACTUAL OBLIGATION

- 8.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 8.2 Preference points shall be calculated after the process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 8.3 In the event that two or more bids have scored equal points, the successful bid must be the one scoring the highest number of preference points for B-BBEE.
- 8.4 However, when functionality is part of the evaluation process and two or more bids have scored equal points for B-BBEE, the successful bid must be the one scoring the highest score for functionality.
- 8.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

## 9. POINTS AWARDED FOR PRICE AND BBEE PREFERENCE POINT

The **80/20** preference point system

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

$$Ps = 80 \{1 - (Pt - P \text{ min})\}$$

P min  
Where:

Ps = Points scored for comparative price of bid under Consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

**B-BBEE PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:**

<b>B-BBEE Status Level of the contributor</b>	<b>Number of points 80/20 system</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 9.1** A trust, consortium or joint venture will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits its B-BBEE status level certificate.
- 9.2** A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits its consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 9.3** Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.
- 9.4** A person will not be awarded points for the B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.
- 9.5** A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.
- 9.6 Consortium**
- 9.6.1. A consortium is an association of two or more individuals, companies, organisations or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.



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- 9.6.2. A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving the joint endeavour, particularly the division of profits. A consortium is formed by contract, which designates the rights and obligations of each member.
- 9.6.3. In a consortium, only the lead bidder's credentials both in terms of financial and technical qualifications are considered. Therefore, the interpretation and application to a RFQ/Bid process is such that the lead partner is identified and the following requirements are required as follows:
- a) **Lead Partner**
- All administrative documents (consortium agreement between the lead partner and the partner)
  - Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfils the requirements of the bid through combination of skills)
- b) **Partner**
- Proof of CSD registration.
  - Tax Pin.
  - BBBEE Sworn-Affidavit.
  - SBD 4
- 9.6.4. It should be taken into cognisance that although the lead partner is the qualifying entity, the partner should prove that it can do business with state-owned entities, through CSD registration, proof that the taxes are compliant, its level of BBBEE status in order to align with the BBBEE status level required by the BID, declare interest and answer questions that it is not a disqualified entity with the National Treasury. The foregoing ensures compliance from an SCM process perspective that the consortium is in order.
- 9.6.5. Of importance is that in a consortium, each individual team members retain their identities.

## 9.7 A joint venture

- 9.7.1. A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.

## 9.8 Unincorporated joint venture:

- 9.8.1 All SCM documents are filled in by the joint venture in the name of the joint venture, although the submission of administrative documents (partnership agreement between parties) will be completed in the name of the joint venture, and the following will be required from both parties, amongst others
- a) SBD 4
- b) SBD 6



- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

## 9.9 Incorporated joint venture

9.9.1 This aligned to a registered entity or company. A registered entity/ company with a consolidated BBBEE certificate and a bank account in the name of the Joint venture. The required compliance documents must be complete by the entity/ company the name of the joint venture, and the following will be required amongst others

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

9.9.2 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.

9.9.3 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

## 10. COMMUNICATION

Respondents are warned that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of INSETA in respect of BID process, between the closing date and the date of the award of the business.

All enquiries relating to this BID should be emailed **three days before the closing date.**

## 11. CONDITIONS TO BE OBSERVED WHEN BIDDING

The organization does not bind itself to accept the lowest or any BID, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of his BID submission. The organization also reserves the right to withdraw or cancel the BID at any stage.

No BID shall be deemed to have been accepted unless and until a formal contract / letter of award is prepared and executed.



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The competitive shall remain open for acceptance by the Organization for a period of **120 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

- 11.1 Not evaluate and award a bid that do not comply strictly with this BID document.
- 11.2 Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the terms of reference.
- 11.3 Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the BID shall be sought, offered or permitted.
- 11.4 Cancel this BID at any time as prescribed in the PPPFA.
- 11.5 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of theof cost effectiveness and the principal of value for money not necessarily on the basis of thelowest costs.

## 12. Cost of Bidding

- 12.1 The bidder shall bear all costs and expenses associated with preparation and submission ofits BID submission and the INSETA shall under no circumstances be responsible or liable forany such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

### Note to Bidders:

- 12.2 Due diligence to be conducted by INSETA prior to the award of the contract.

## **END OF TERMS OF REFERENCE DOCUMENT**