



Transport Education Training Authority

*Driven by Vision*

## COMPLIANCE CHECKLIST OF RETURNABLE DOCUMENTS BY THE BIDDER

### SCHEDULE 22 - COMPLIANCE CHECKLIST OF RETURNABLE DOCUMENTS MANDATORY REQUIREMENTS – STAGE 1 EVALUATION

Bidders who fail to meet and of the following mandatory requirements will be disqualified at Pre-Compliance Phase:

**NB. Tick with "X" if you comply / not comply / Not Applicable**

Criterion	Requirement	Comply	Not Comply	Not Applicable
Invitation to bid (SBD 1)	<ul style="list-style-type: none"> <li>The form must be completed and signed in black ink.</li> </ul>			
Bid submission	<ul style="list-style-type: none"> <li>Bid documents must be completed in full and all declarations of interest must be signed. For JV or consortium all declarations must be signed by all parties.</li> <li><b>Only one (1) original copy</b> must be submitted, signed by an authorised representative (s).</li> <li>This is a Two-Envelope System for the <b>technical proposal</b> and <b>pricing proposal</b>.</li> <li>The Technical Proposal <b>MUST</b> be submitted <b>separately</b> from the Price Schedule and SBD 3.3. form.</li> </ul> <p>Price Schedule and SBD 3.3 form must be submitted in <b>separate</b> clearly marked sealed envelope. This envelope must be clearly marked with the bidder's name and tender description.</p> <ul style="list-style-type: none"> <li>A second copy of the <b>technical submission</b> <b>MUST</b> be submitted per a <b>virus free USB</b> and <b>MUST</b> not include</li> </ul>			

Criterion	Requirement	Comply	Not Comply	Not Applicable
	the Pricing Schedule and information relating to Pricing.			
Declaration of Interest (SBD 4)	<ul style="list-style-type: none"> <li>The bidder must fully complete and sign the Declaration of interest form.</li> </ul> <p>For JV or consortium all parties must complete and sign this declaration, per company.</p>			
Declaration of the bidder's past SCM practices (SBD 8)	<ul style="list-style-type: none"> <li>The bidder must fully complete and sign the SBD 8 form.</li> </ul> <p>For JV or consortium all parties must complete and sign this declaration, per company.</p>			
Certificate of Independent Bid Determination (SBD 9)	<ul style="list-style-type: none"> <li>The bidder must complete and sign the SBD 9 form.</li> </ul> <p>For JV or consortium all parties must complete and sign this declaration, per company.</p>			
SARS Pin / CSD Supplier Number	<ul style="list-style-type: none"> <li>The bidder must submit a SARS Pin with expiry date to assist with verification of Tax Affairs.</li> <li>If SARS Pin is not submitted provide CSD Supplier Number</li> </ul> <p>In a case of a JV, all companies' Tax Clearance Certificates or SARS pins must be submitted</p>			
Proposal submission	<ul style="list-style-type: none"> <li>This is a Two-Envelope System for the technical proposal and pricing proposal</li> </ul>			
Briefing Session	<ul style="list-style-type: none"> <li>A compulsory briefing session will be conducted through a Zoom link and time will be allocated for Questions and Answers to bidders.</li> <li><b>NB. Service providers who fail to attend the compulsory briefing session will be disqualified from the bidding process.</b></li> </ul>			
Joint Venture Agreement	In a case of a JV, a JV Agreement must be submitted and signed by all parties.			

Criterion	Requirement	Comply	Not Comply	Not Applicable
CIPC Documents	<ul style="list-style-type: none"> <li>The bidder must provide certified copies of Company / Close corporation registration certificates issued by CIPC.</li> </ul> <p>Bidders must confirm their company registration with CIPC as TETA will not award any tender to any business that appears on the CIPC List of de-registered businesses.</p>			
Central Supplier Database <u>Registration</u>	<ul style="list-style-type: none"> <li>The bidder must be registered as a supplier with Treasury on <a href="http://www.csd.gov.za">www.csd.gov.za</a>. (Please attach proof)</li> </ul>			

#### DEFINITELY NOT NEGOTIABLE (DNN) REQUIREMENTS – STAGE 2 EVALUATION

All bidders who pass the Mandatory Requirements will be evaluated on the following DNN Requirements and a bidder who fails to meet any of these requirements will be disqualified from further evaluation of functionality:

**NB. Tick with “X” if you comply / not comply / Not Applicable**

Criterion	Requirement	Comply	Not Comply	Not Applicable
Professional Association and Certification	<ul style="list-style-type: none"> <li>Provide proof of a valid certificate of registration and affiliation with the relevant regulatory and professional body: <ul style="list-style-type: none"> <li>Financial Sector Conduct Authority (FSCA) for the <b>bidder, Accounts Manager</b> and the <b>service personnel</b>.</li> </ul> </li> </ul>			
Bidder experience	<ul style="list-style-type: none"> <li>The bidder must possess a minimum of 5 years’ experience in providing insurance services for property and assets.</li> <li><b>COMPULSORY: Complete Experience Schedule attached.</b></li> </ul>			
References	<ul style="list-style-type: none"> <li>The bidder must have at least two (2) contactable references reflected in the Experience Schedule</li> </ul>			
Accounts Manager experience	<ul style="list-style-type: none"> <li>The Accounts Manager must have a <b>minimum of five (5)</b> years in managing and leading a category 1,</li> </ul>			

Criterion	Requirement	Comply	Not Comply	Not Applicable
	subcategory 6 products and stakeholder management.  <ul style="list-style-type: none"> <li>• <b>COMPULSORY: Complete Experience Schedule attached, linked to the details on the CV.</b></li> </ul>			

**NB: All bidders who pass the Pre-Compliance Evaluation will be further evaluated on Functionality.**