

SERVICES: Courier Services for 36 months

TENDER REF: SAICA001/2018

CLOSING DATE: 02 FEBRUARY 2018

CLOSING TIME: 12:00



CONDITIONS FOR COMPLETING BID DOCUMENTS

If any of the following bid forms are not completed and signed or not handed in with your bid proposal which accompanying supporting documents on closing date and time, your proposal will be immediately disqualified.

Document	Comments	Submitted? (Yes / No)
Invitation to bid	Make sure it is signed	
Tax Clearance Certificate	Certificate must be original and valid	
Vat Registration Certificate	If applicable	
Total bid price	Must be filled in and signed. Failure to sign will invalidate your bid.	
Pricing schedule	Filled in or refer to an Annexure or addendum where price is mentioned	
Declaration of interest	Must be signed. Failure to sign will invalidate your bid.	
Certificate of Independent Determination	Must be signed. Failure to sign will invalidate your bid.	
Certified copies of Company/ Close Corporation Registration Documentation	[If applicable] <ol style="list-style-type: none">1. certificate of registration,2. change of name certificate (if applicable)3. register of directors / members, and4. most current registered business address	
BBBEE Certificate OR affidavit	Valid copies must be submitted	

Bid Documents must be completed with ink (blue or black) and not typed

Please note: **No tippex is allowed.** All changes must be scratched out and a signature next to each change



INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN INSTITUTE OF CHARTERED ACCOUNTANTS t/a SAICA

BID NAME: **Courier Services for 36 months**

BID NUMBER: **SAICA001/2018**

CLOSING DATE: **02 February 2018**

CLOSING TIME: **12:00**

ALL QUOTATIONS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)

This bid is subject to the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract which will be furnished ONLY to the winning bidder.

NAME OF BIDDER

POSTAL ADDRESS

STREET ADDRESS

CELLPHONE NUMBER TEL. NUMBER

VAT REGISTRATION NUMBER

SIGNATURE OF BIDDER DATE:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

TOTAL BID PRICE INCLUDING VAT



2. DEFINITIONS

- 2.1 **“All Applicable Taxes”** includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 2.2 **“B-BBEE status level of contributor”** means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 2.3 **“Bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive bidding processes or proposals;
- 2.4 **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.5 **“Comparative price”** means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.6 **“Consortium (or joint venture)”** 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;
- 2.7 **“Contract”** means the agreement that results from the acceptance of a bid by an organ of state and shall include any schedule, drawings, patterns, samples attached any agreement entered into and all other Schedule hereto;
- 2.8 **“Contractor(s)”** means a Bidder whose bid has been accepted by SAICA;
- 2.9 **“Cost of materials”** means the cost of components, parts or materials which are intended for the production, manufacturing or assembling of the goods bid for and which are not produced, manufactured or assembled in the factory where the production, manufacture or assembly of such goods occurs, including freight, landing costs, port charges, import duties and other import costs of such components, parts or materials and all costs in connection with the handling and transport thereof prior to delivery at that factory;
- 2.10 **“EME”** means any enterprise with annual total revenue of R5 million or less.
- 2.11 **“Firm Price”** means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.12 **“Functionality”** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 2.13 **“Joint Venture” or Consortium** see 2.7
- 2.14 **“Letter of Appointment”** means the written communication by SAICA to the Contractor recording the acceptance by SAICA of Contractor’s bid subject to the further terms and conditions to be itemized in the contract;
- 2.15 **“Non-firm Prices”** means all prices other than “firm” prices;
- 2.16 **“Person”** includes a juristic person;



- 2.17 **“Purchase Order(s)”** means an official order issued by SAICA for the supply of goods pursuant to a contract or bid;
- 2.18 **“Rand Value”** means the total estimated value of a contract in South African currency, calculated at the time of bid invitations, and includes all applicable taxes and excise duties;
- 2.19 **“SAICA”** shall mean **The South African Institute of Chartered Accountants t/a SAICA** and its joint venture companies;
- 2.20 **“Signature date”** and in relation to any contract, means the date of the letter of appointment;
- 2.21 **“Sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing, another person to support such primary contractor in the execution of part of a project in terms of the contract;
- 2.22 **“Tax Clearance Certificate”** means a tax clearance certificate issued by the South African Revenue Services (SARS) confirming that the natural or juristic person is a registered tax payer.
- 2.23 **“Termination date”** in relation to any Contractor means the date of the final delivery certificate;
- 2.24 **“Value Add”** means that portion of the bid price not constituting the cost of materials;
- 2.25 **“Warranties”** means collectively any and all warranties listed and otherwise (if any) given by the Bidder in term of this agreement.



CONDITIONS OF BIDDING

Proprietary Information

- 3.1 SAICA considers this tender and all related information, either written or verbal, which is provided to the respondent, to be proprietary to SAICA. It shall be kept confidential by the respondent and its officers, employees, agents and representatives. The respondent shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of SAICA.

Enquiries

- 3.2 All communication and attempts to solicit information of any kind relative to this tender should be in writing and channeled to: siphwet@saica.co.za cc vuyelwav@saica.co.za, on or before **01 February 2018 at 16:00**.
- 3.3 All the documentation submitted in response to this tender must be in English. The full tender document must be returned.
- 3.4 The Bidder should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by SAICA in regard to anything arising from the fact that pages are missing or duplicated.

Validity Period

- 3.5 Responses to this tender received from suppliers will be valid for a period of 60 days counted from the closing date of the tender.

Submission of Tenders

- 3.6 Tenders should be submitted in **duplicate** all bound in a sealed envelope, with an electronic copy (**disc or memory stick only**) endorsed "**BID: SAICA001/2018**". The sealed envelope must be placed in the tender box at the RECEPTION AREA of 17 Fricker Road, Illovo, by **12:00 on 02 February 2018**.
- 3.7 Amended bids may be sent, together with the original bid, in an envelope marked "**Amendment to bid**", should be clearly marked to represent the original document and should be placed in the bid box before the closing date and time.
- 3.8 The closing date, name of the bidder and the return address must also be endorsed on the envelope or bid documents. If a courier service company is being used for delivery of the bid document, the bid description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered into the BID BOX.
- 3.9 The bidder is responsible for all the cost that they shall incur related to the preparation and submission of the bid document.
- 3.10 Kindly note that SAICA is entitled to amend any bid conditions, validity period, specifications, or extend the closing date of Quotations before the closing date. All bidders, to whom the bid documents have been issued, will be advised in writing of such amendments in good time.
- 3.11 **SAICA reserves that right not to accept the lowest bid price of any tender in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract in terms of outputs and services and who is financially advantageous to SAICA.**



3.12 SAICA also reserves the right to award this bid as a whole or in part without furnishing reasons.

3.13 SAICA reserves the right to amongst other things, conduct unscheduled or schedule site visit to satisfy itself, as to the validity of the information provided on this bid documents.

Tax Clearance Certificate Requirements

3.14 It is a condition of bid that the taxes of the successful bidder **must be in order**, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder’s tax obligations.

4 PREFERENCE POINTS CLAIM FORM IN TERMS OF SAICA’S PREFERENTIAL PROCUREMENT

4.1 This preference form must form part of all bids invited. It contains general information and serves as a guide to claim preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution.

4.2 SAICA’s Preferential procurement policy will apply for all bids in accordance with the table below:

BBBEE status of Contributor	No of points
1	10
2	9
3	8
4	6
5	4
6	3
7	2
8	1
Non-compliant contributor	0

4.3 A consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their **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.

4.4 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.

5 SUB-CONTRACTING

5.2 A person or entity awarded a contract may not sub-contract more than **25%** of the value of the contract to any other entity that does not have **an equal or higher** B-BBEE status level than the person or entity concerned.

5.3 Will any portion of the contract be sub-contracted? YES / NO (delete which is not applicable)

5.4 If Yes, indicate:
 (i) what percentage of the contract will be subcontracted?%



- (ii) the name of the sub-contractor?.....
- (iii) Registration number
- (iv) VAT registration number
- (v) the B-BBEE status level of the sub-contractor?
- (vi) whether the sub-contractor is an EME? YES / NO (delete which is not applicable)

6 SCOPE OF WORK

6.1 Background

The South African Institute of Chartered Accountants. (“SAICA”) is responsible for the education, training and assessment for qualifying Chartered Accountants (CAs(SA)) in South Africa. Parcels, documents etc. are delivered to different destinations throughout South Africa. Deliveries at times pre-determined and specified are critical and is therefore one of the key performance indicators (KPIs) that must be met.

SAICA seeks the services of a service provider with whom we can contract to provide delivery courier services for a period of 3 (three) years. The service provider should be able to work with SAICA to ensure that the defined KPIs are achieved.

6.2 Detailed Scope Of Work

Service providers must submit a proposal for the provision of delivery/courier services for local and national deliveries as well as internationally, where applicable.

The courier service provider must have a minimum of 5 (five) years of experience and a minimum of 5 (five) corporate clients. The services must include the collection and delivery of consignments, documents, packages or equipment from/to SAICA offices and will be expected to make deliveries at any other venue or areas as instructed.

The service provider must have an electronic tracking system, shipment insurance, payment and billing options, packaging and ad-hoc shipment preparation and other support services that will be beneficial to the efficiency of the service.

Evidence of experience in successfully transporting highly confidential documents is an advantage.

7. COMPLIANCE REQUIREMENTS

7.1 Legislative Requirements

The service provider must comply with the applicable generic legislation including:

- a) SAICA’s Rules and regulations, upon appointment;
- b) Compensation for Occupational Injuries and Diseases Act (Act 130 of 1993);
- c) Occupational Health and Safety Act (Act 85 of 1993);
- d) Postal Services Act (Act No.124 of 1998);
- e) Civil Aviation Act (Act 13 of 2009); and
- f) Financial Advisory and Intermediary Services Act (Act 37 of 2002).



7.2 Mandatory Legislative Requirements

- a) The service provider must be registered with the National Bargaining Council for the Logistics and Road Freight Industry and submit proof thereof; and
- b) The courier service provider must be registered with ICASA in terms of the Postal Services Act and submit proof thereof.

7.3 Other Requirements

- a) The service provider must at least be ISO 9001: 2008 certified or in the process thereof and must submit proof thereof; and
- b) The service provider must be registered with South African Express Parcel Association (SAEPA) and must submit proof thereof.

8. SOLUTION REQUIREMENTS

8.1 Courier Solution

The service provider must provide a courier service solution that includes, but is not limited to the following:

- a) A timeous, consistent, reliable and secure collection and delivery processes. An appropriately secured vehicle to be provided for the collection and delivery of consignments;
- b) An effective packaging and labelling process. The service provider must provide bags for the packaging of consignment and relevant label printing equipment;
- c) A secure storage site for confidential documents at the courier warehouse should these not be delivered on the same day as collected from SAICA offices;
- d) Signing and authorisation procedures;
- e) Charge-back details for costing purposes;
- f) Tracking and tracing system; and
- g) Scheduled services;

8.2 Tracking Solution

The service provider must provide detailed information of its proposed tracking administration solution comprising of at least the following:

- a) A tracking solution that will allow the SAICA to track progress of collection and delivery of secure documents such as confidential exam papers etc;
- b) A central hub where records, dispatching and receiving of parcels occurs;
- c) A document scanner and automated document feed features;
- d) Satellite tracking of vehicle;
- e) The solution must be accessible either via the web or mobile platform;
- f) A solution that will enable the service provider to facilitate billing;
- g) Must have automated reporting capabilities;
- h) Must have the ability to generate reports on real-time basis.

8.3 Delivery Services

The service provider must always ensure that its employees at all times respect the confidentiality of the delivery and ensure that they reach the intended recipient(s) timeously.

All the deliveries must be effected within the required timeframes as stipulated below



- All deliveries/collections must be effected as per the requisition from time to time, particularly as it relates to instructions around delivery and collection of exam related documents (some of which may be outside operating hours).
- All emergency deliveries/collections requests must be done on the same day.

The operating hours of SAICA are Monday – Friday, 07h00 – 16h30. Deliveries must always be made during office hours. However, the service provider must have the capability to offer after-hours/Saturday/Sunday/Public Holiday on special request.

The types of services required are as follows:

- a) Same day delivery services;
- b) Overnight delivery services;
- c) Delivery of consignment of confidential information within and at specified times;
- d) Special delivery services (emergency);
- e) Outlying/remote area delivery services;
- f) Import services including customs clearance of air and sea freight shipments into South Africa; and
- g) Customs clearance for inbound shipments arriving in South Africa.

8.4 Insurance

It should be noted that the service provider will be liable for any damage or loss of goods while in their possession.

The service provider must either be a licensed intermediary or provide insurance with an authorised Financial Services Provider in terms of the Financial Advisory and Intermediary Services Act (Act 37 of 2002).

9. KEY PERFORMANCE AREAS

SAICA will develop a performance management system which the service provider will be evaluated against on a quarterly basis. The key performance will range from 1 (poor) to a maximum of 4 (excellent). Details will be defined during contracting stage.

The following key performance indicators will be used to evaluate the performance of the service provider:

- a) 95% on time deliveries and collection of parcels, according to delivery service (except for exam deliveries which need to be measured as 100%);
- b) Appropriate and adequate quality packaging and labelling according to the nature of the parcel to ensure safety of goods in transit;
- c) High security of goods sent/collected via courier, particularly with exam related documents;
- d) Zero tolerance of losses of goods in transit;
- e) Submission of monthly courier service reports
 - i. Delivery turnaround times;
 - ii. Number of waybills per month;
 - iii. Incident reporting turn-around times;
 - iv. Incident reporting on losses;
 - v. Report on late collection and deliveries;
- f) Submission of monthly invoices and statements by 3rd of each month;
- g) All enquiries to be attended within 48 hours;
- h) Tracking system functionality performance at 95%; and
- i) Adequate insurance of valuable parcels.



10. EVALUATION CRITERIA

Minimum qualifying criteria must be met or your bid will not be eligible for evaluation;

- Proof of National Bargaining Council for the Logistics and Road Freight Industry
- Proof of registration with ICASA in terms of the Postal Services Act
- ISO 9001: 2008 certification or similar or in the process thereof
- Proof of registration with South African Express Parcel Association (SAEPA)
- Proof of Insurance

No.	Sub Criteria	Weight
1	Company: Number of years the organisation has been providing courier services industry	20%
	3-4 years	5
	5-6 years	10
	7-8 years'	15
	9 years and above	20
2	Key Personnel) (attach CVs)	20%
	3-4 years' experience in Team Leader/Accounts Manager	5
	5-6 years' experience in Team Leader/Accounts Manager	10
	7-8 years' experience in Team Leader/Accounts Manager	15
	and >9 years' experience in Team Leader/Accounts Manager	20
3	Solution Proposal	40%
	Methodology and company profile	5
	Understanding of SAICA business and expectations	10
	Nature and examples of previous and current clients	15
	Letters of recommendation attached minimum of three (3)	20
4	BBBEE Score	20%
	BBBEE level score as per Section 4.2 above	10%
	BBBEE must reflect the diversity of the company.	10%
	TOTAL	100%
	MINIMUM THRESHOLD	70%



ANNEXURES

A: DECLARATION OF INTEREST BY BIDDER

Tender Name:

Tender ref:

- Any legal person, including persons employed by SAICA or persons having a kinship with persons employed by SAICA, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons employed by SAICA, who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid. It is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority.
- As a Service Provider I hereby declare that I, or and parties directly related to me (i.e. relative and friend) have a personal association with an employee at SAICA.

Name of SAICA associate	Relationship

- As a Service Provider I hereby declare that neither I, nor any parties directly associated to myself (i.e. relative and friend) have a personal association with an employee at SAICA.

Name of representative:

Signature: Date:

Bidding Company:



B: CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Document must form part of all bids invited.
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
3. Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.
4. SAICA reserves the right to:
 - (a) Disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - (b) Cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
5. I, the undersigned, in submitting the accompanying bid as stated below, certify that:
 - 5.1 I have read and I understand the contents of this Certificate;
 - 5.2 I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
 - 5.3 I am authorised by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
 - 5.4 Each person whose signature appears on the accompanying bid has been authorised by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
 - 5.5 For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organisation, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) Provides the same goods and services as the bidder and/or is in the same line of business as the bidder
 - 5.6 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 consortium³ will not be construed as collusive bidding.



- 5.7 In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) Methods, factors or formulas used to calculate prices;
 - (d) The intention or decision to submit or not to submit, a bid;
 - (e) The submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) Bidding with the intention not to win the bid.
- 5.8 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 5.9 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.
- 5.10 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to Quotations and contracts, Quotations 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.

Tender name: Tender ref.:

Name of representative:

Signature: Date:

Bidding company: