

26 February 2024

Dear Tenderer

RFB NO. 00442/2023: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT RECOMMENDATIONS

SUBJECT:

You are hereby invited to tender for the abovementioned Service in accordance with the documents of enquiry contained herein.

Elucidation of the Enquiry

Should any part or parts of the enquiry require further explanation, be ambiguous or contradictory, elucidation prior to submission of your proposal, and is to be obtained from:

All Commercial and Technical queries:

Mbali Masilela Tel: 011 703 7006 or e-mail: mbali.masilela@nbcrcfi.co.za

Submission of Tender

Your tender is to be submitted in the manner described in the **Instructions to Tenderers** contained in **Section A** of the enquiry document by not later than the **19 March 2024 @12:00pm. Further to note the intension to tender closing date is 08 March 2024 @ 12:00pm.**

Further to note the intention to tender closing date is 08 March 2024 @ 12:00pm.

Failing to respond to intention to tender your submission will be disqualified.

Yours faithfully

Nozililo Nzamela
Procurement Manager

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NATIONAL BARGAINING COUNCIL FOR THE ROAD FREIGHT AND LOGISTICS INDUSTRY

RFB NO. 00442/2023

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT RECOMMENDATIONS

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SECTION A

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT RECOMMENDATIONS.

INSTRUCTIONS TO TENDERER

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INSTRUCTIONS TO TENDERERS

TENDERS THAT CONSIST OF ONE ORIGINAL MUST BE SENT VIA A LINK THAT WILL BE PROVIDED

BY THE TIME AND DATE STIPULATED IN THIS ENQUIRY.

NB: TENDERS MUST NOT BE ADDRESSED OR DELIVERED TO INDIVIDUALS.

1. CLARIFICATION OF ENQUIRY DOCUMENTS

Should there be doubt as to the meaning of the enquiry document; the Tenderer shall seek clarification before submitting a tender. All additional information supplied shall be made available to all other Tenderers. All queries shall be submitted by not later than **15 March 2024 @ 12:00pm.**

2. AGREEMENT CONDITIONS

The Conditions of Contract shall be the Conditions of Contract contained in the enquiry document. The Tenderer may submit a tender containing proposed variations or qualifications to the Contract Conditions.

3. MAIN OFFER AND ALTERNATIVE PROPOSALS

Tenderers shall submit a main offer on the forms provided in accordance with the requirements set out in the enquiry.

Tenderers may in addition submit electronically an alternative offers, which shall clearly indicate either technical and/or financial advantages to the NBCRFLI.

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4. SUFFICIENCY OF TENDER

No alterations will be allowed once a tender has been submitted. In the event of any discrepancies occurring between the prices and particulars detailed by the Tenderer in the forms provided with the enquiry and those contained in any additional letter or document by the Tenderer, the former shall prevail.

5. TENDERER TO INFORM THEMSELVES FULLY

The Tenderer is to examine the scope of services provided. Should there be any doubt as to the meaning of the scope of services, or ambiguity as to the scope of the enquiry, the Tenderer is to immediately notify the NBCRFLI and have the matter rectified, otherwise it will be taken that the enquiry is fully understood, and no liability for errors will be admitted due to the foregoing.

6. EXTENSIONS TO TENDER CLOSING DATE

Under no circumstances will requests for extensions to the tender closing date be considered unless there are delays in providing additional information that is due from NBCRFLI.

7. REJECTION OF TENDERS

A tender may be rejected if: -

- 7.1 It is received after the time and closing date stipulated in the enquiry or a subsequent official amendment thereto.
- 7.2 It contains any omission, erasure, alteration, text addition or irregularity;
- 7.3 It does not include the required information necessary for proper comparison and evaluation.
- 7.4 It is not in accordance with the commercial and technical requirements of the evaluation.

8. CONFIDENTIALITY OF ENQUIRY DOCUMENTS

The enquiry document shall be treated as strictly confidential by the Tenderer.

Tenders received will be treated as confidential and no aspect of any tender will be disclosed to third parties by NBCRFLI.

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9. ACCEPTANCE OF TENDERS

The NBCRFLI reserves the right to reject any tender, or accept portions of tenders received, without being obliged to give reasons.

10. VALIDITY

Tenders shall remain open for acceptance for 90 (ninety) days from the closing date.

11. EXPENSE IN PREPARATION OF TENDERS

The NBCRFLI will not be responsible for any expenses or losses, which the Tenderer may incur in the preparation of the tender.

12. CONDITIONS UNDER WHICH TENDERS WILL BE CONSIDERED

No tender will receive consideration unless it is complete and in accordance with the requirements of this enquiry specification. Should the Tenderer wish to offer services which in his opinion is considered an improvement arrangement or selection the Tenderer may submit such an offer as an alternative to the main offer.

13. SUBMISSION OF TENDERS

13.1 Tender - Soft Copy

An online link will be effected by the NBCRFLI specifically for the Service Providers who have submitted their details for the Intention to tender to be submitted to mbali.masilela@nbcfrfi.co.za by the **08 March 2024 at 12:00 PM**.

RFB NO. : **00442/2023**

DESCRIPTION : **APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT RECOMMENDATIONS.**

CLOSING DATE : **19 March @ 12:00 PM (submission of tender document)**

The Tenderer shall prepare and submit electronically one original set and of the documents comprising the Tender and supplementary information.

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14. EVALUATION

14.1 All tenders will be evaluated by a bid evaluation committee.

14.2 The evaluation of the bids will be done in a two stage process:

14.2.1 The **first stage** will be the evaluation of bids on functionality.

14.2.2 The **second stage** of evaluation will be on the 80/20 principle, where 20 points is allocated for preference and 80 points for price only.

STAGE 1: FUNCTIONALITY – 100 Points

- A total points of **100** is allocated for Functionality.
- **Tenderers shall score a minimum of 70 points on functionality from submitted document and in conjunction with presentation in order to move on to the next stage where they will be evaluated on Price and Price and Preference Points.**

15. EVALUATION CRITERIA

15.1 Functionality

CRITERIA	Rating					Weight	Total
	1	2	3	4	5		
The functionality proposal will be evaluated on a scale of 1-5 in accordance with the criteria below. The rating will be as follows; 0=Non submission; 1=poor; 2=Average; 3=Good; 4=Very Good and 5= Excellent.							
1. Functionality							
1.1. Project Plan The Bidder must provide the Project Plan which must outline the process, activities, timeframes, costing, deliverables, approach to conducting the survey, reporting, presenting results and recommendations, delivery of milestones to achieve the work: <ul style="list-style-type: none"> • No project plan = 0 points 						10	

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CRITERIA	Rating					Weight	Total
	1	2	3	4	5		
<ul style="list-style-type: none"> • Project plan without outlining processes, activities detailed deliverables = 2 points • Project plan, processes, and activities = 3 points • Project plan, processes and activities aligned with the timelines = 4 points • Project plan, processes, activities, and deliverables aligned to the timelines = 5 points 							
<p>1.2 Approach and Methodology</p> <p>The Bidder must demonstrate the ability to develop a clear survey/study proposal which must outline the methodology in relation to generating the acceptable sample, conducting the survey, collecting required data, quality controls, analysing collected data, make findings and recommendations = 5 points</p> <ul style="list-style-type: none"> • No approach and methodology = 0 points <ul style="list-style-type: none"> - Approach and Methodology without substantial details = 2 - Average approach and methodology = 3 points - Satisfactory approach and methodology = 4 - Comprehensive approach and methodology = 5 						30	
<p>1.3 Track Record</p> <p>The Bidder must demonstrate the relevant track record of undertaking the survey/study with contactable client referees referencing completed work on the clients' letterhead:</p> <ul style="list-style-type: none"> • No letter = 0 points • One letter = 2 points • Two letters = 3 points • Three letters = 4 points • Four letter and more = 5 points 						30	
<p>1.4 Qualification</p> <p>The Bidder must demonstrate that the team leader has the requisite qualification(s) in any one of the following: Survey generation and management/Statistics/Data collection/Data analytics/Data Science/Marketing research</p>						15	

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CRITERIA	Rating					Weight	Total
	1	2	3	4	5		
<p>and analytics/Business Analytics/Research methodology/Monitoring and evaluation to execute the project by submitting certified qualifications and CV of the project team leader:</p> <ul style="list-style-type: none"> Project leader without post graduate qualification = 0 points Team members with undergraduate qualification = 3 points Team leader with post graduate qualification = 4 Project leader and team members with postgraduate and undergraduate qualifications = 5 points 							
<p>1.5 Experience</p> <p>The Bidder must demonstrate that the Project leader has the minimum required experience in conducting the study:</p> <ul style="list-style-type: none"> Less than 3 years = 0 points 3 to 4 years = 3 points 5 years = 4 points 6 years and above = 5 points <p>The Bidder must demonstrate that the company has the minimum required experience in conducting studies and data analysis:</p> <ul style="list-style-type: none"> Less than 3 years = 0 points 3 to 4 years = 3 points 5 years = 4 points 6 years and above = 5 point 						15	
TOTAL						100	
A minimum threshold of 70 is applicable							

The percentage for functionality will be calculated as follows

$$P_s = \frac{S_o}{M_s} \times A_P$$

Where:

P_s = percentage scored for functionality by bid under consideration

S_o = total score of bid under consideration

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Ms= maximum possible score, i.e. 5x **(a)** 100=

Ap = percentage allocated for functionality (in this bid = 100)

- i. The value scored for each criterion will be multiplied by the specified weight for the relevant criterion to obtain the marks scored for each criterion.
- ii. The scores for each criterion will be added to obtain the total score.
- iii. This score will be converted to a percentage and only bidders that have met or exceeded the minimum qualifying score of 70 percent of 100 percent on functionality will be evaluated further.
- iv. Bidders not meeting a minimum qualifying score of 70 percent on functionality will be disqualified.

Sub-Contracting

A tenderer will not be awarded points for BBBEE status level if it indicated in their proposal/tender document submitted that such a tenderer 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 tenderer qualifies for, unless the intended sub-contractor is an Exempted Micro Enterprise (EME) that has the capability and ability to execute the sub-contract.

A tenderer 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 BBBEE status level than the successful tenderer concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

The tenderer is required to provide information regarding sub-contracting on the schedule of proposed sub-contractors form as well as the schedule for transformation requirements in Section B of this enquiry.

General

During the evaluation process NBCRFLI may engage with one or more tenderers for clarification of their tender. Tenderers must also note that presentations may be required and as a result they must be always prepared when submitting their tender documents. Based on the results of the evaluation process, NBCRFLI will approve the awarding of the contract to the successful tenderer subject to a due diligence being conducted.

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SECTION B

REQUEST FOR THE APPOINTMENT OF AN INDEPENDENT SERVICE PROVIDER FOR THE DEVELOPMENT OF THE PERFORMANCE EVALUATION STANDARD FOR THE COUNCIL GOVERNANCE STRUCTURES.

FORM OF TENDER

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**NATIONAL BARGAINING COUNCIL FOR THE ROAD FREIGHT AND LOGISTICS
INDUSTRY**

RFB NO. 00442/2023

**APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO
UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT
RECOMMENDATIONS.**

FORM OF TENDER

INDEX

A. Proposed Solution and Standard Forms

Item Title

1. Company's Profile and Proposed Solution
2. Tenderer's references
3. Schedule of Proposed Sub-Contractors
4. Alterations by Tenderer
5. BEE and Tax Clearance Certificate
6. Supplier Registration Form
7. Declaration of Interest

B. Financial Proposal

Item Title

1. Offer
2. Summary of Costs

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A. PROPOSED SOLUTION and STANDARDS FORMS

A 1. COMPANY PROFILE AND PROPOSED SOLUTION

Tenderers to provide the company profile and the Solution.

A.2 TENDERER'S REFERENCES

Tenderers to provide three (3) contactable references of relevant services carried out in the last five years that best illustrate the experience of the tenderer. Use the below example.

Tenderers are requested to provide three (3) references of relevant services carried out in the last five years that best illustrate the experience of the tenderer		
Using the format below, provide information on each assignment for which your firm/entity, either individually as a corporate entity or as one of the major companies within an association, was legally contracted.		
Assignment Name:		Country:
Location within Province:		Professional Staff Team Provided by Your Company /Entity (Profiles):
Name of Entity/Client:		Types of Funds Managed:
Address:		Duration of Assignment:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Fund:
Name of Associated Companies, If any:		No. of months of Professional Staff Provided by Associated Companies:
Comment:		

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A.3 SCHEDULE OF PROPOSED SUB-CONTRACTORS

The Tenderer shall detail below all Sub-contractors that he proposes to employ to render of any part of the Services, together with a description of the service he proposes to sub-contract. Notwithstanding the inclusion of any Sub-contractor herein, this shall be read in conjunction to clause 14 [Evaluation] above in Section A of this enquiry as well as the schedule for transformation requirements.

NAME	WORK TO BE SUB-CONTRACTED	APPROXIMATE VALUE

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A.4 ALTERATIONS BY TENDERER

Should the Tenderer desire to make any departures from or modifications to the Conditions of Contract, Schedule of Prices, or to qualify his tender in any way, he shall set out his proposals clearly hereunder, or alternatively state them in a covering letter attached to his tender and referred to hereunder, failing which the tender will be deemed to be unqualified.

PAGE	CLAUSE OR ITEM	PROPOSED ALTERATIONS

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A.5 BEE AND TAX CLEARANCE CERTIFICATE

Tenderers are required to provide a valid BEE and Tax Clearance Certificate.

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A.6 SUPPLIER REGISTRATION FORM

It is expected of tenderers who are not registered on the NBCRFLI's accredited Supplier Database to register using the prescribed form. Once the form is completed it may be submitted together with the tender. The NBCRFLI reserves the right not to award tenders to tenderers who are not registered on the Database.



SUPPLIER REGISTRATION FORM

*All sections marked with an apteryx “**” are compulsory to complete*

Please Note

- ◇ This form must be completed by all applicants wishing to register as suppliers on the NBCRFLI supplier database. Please reflect all the resources the firm has such as: Years of Experience, No of employees etc. Also reflect the expertise and experience that the company has. Other relevant additional documentation may also be attached. The NBCRFLI will determine the suitability of firms for entry into its database, based on the information provided.
- ◇ All sections of the application form must be completed in full.
- ◇ The application form is to be completed by the duly authorised official of the contracting firm.

Registration pre-requisites

- ◇ Proof of company registration and/or any other form of legal standing must be submitted.
- ◇ A *current and original* Tax Clearance Certificate from South African Receiver of Revenue Service [SARS] certifying that the taxes of the applicant are in order or that suitable arrangements have been made with SARS to bring them in order. The Tax Certificate will be reworded at the allocated space for the VAT number with the words “compulsory if turnover is more than R1, 000 000”. Where the person is not required to be registered for VAT, the Receiver of Revenue will write issue the certificate with blank VAT reference number.
- ◇ Submit proof of Professional Registration with the relevant Professional Body.
- ◇ Submit Company composition on the form attached as Section “C” also referred to a CK1
- ◇ Attach Black Economic Empowerment (BEE) Strategy/Transformation Strategies/strategies to empower the Disabled/physically challenged.
- ◇ Company Profile
- ◇ Proof of banking details

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A.7 DECLARATION OF INTEREST

DECLARATION OF INTERESTS (KINSHIP, RELATIONSHIP WITH PERSONS EMPLOYED BY NBCRFLI)

In terms of the Procurement Policy, no person or persons employed by the NBCRFLI may be awarded a bid by the Council. Any legal person, or persons having a kinship with persons employed by the NBCRFLI including a blood relationship, may make an offer in terms of any bid invitation. In view of possible allegations of favouritism, should a resulting bid or part thereof be awarded to persons connected with or related to an employee of the NBCRFLI, it is required that the bidder or his/her authorized representative declare his position vis-à-vis the evaluating authority and/or take an oath declaring his/her interest, where–

- the legal person on whose behalf this application signed, has a relationship with persons/a person who are/is involved with the evaluation 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 declarer acts and persons who are involved with the evaluation of the bid.

In order to give effect to the above, the following questionnaire shall be completed and submitted with the bid.

Do you, or any person have any relationship (family, friend, other) with a person employed with the NBCRFLI or its Administration and who may be involved with the evaluation, preparation and/or adjudication of bids?

Yes/No

If so, state particulars

.....

.....

Are you or any other person connected with this application, employed the NBCRFLI?

Yes/No

If so, state particulars

.....

.....

.....

SIGNATURE OF DECLARER

DATE

POSITION OF DECLARER
APPLICANT

NAME OF COMPANY OR

I/we, the undersigned (Print name/s) _____	
Certify that the information as finished in this document is correct.	
_____ Signature/s	_____ Date
_____ Designation (Please initial all other pages of this document)	

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B. FINANCIAL PROPOSAL

B.1 BID PRICE / OFFER

Having examined the Specifications and all other documentation contained in the Enquiry document for the above named Services, we the undersigned, offer to carry out the whole of the said Services in conformity with the said Enquiry document, which includes all these documents for the sum of:

NOTE: REFER TO SUMMARY OF COSTS ATTACHED HERETO.

R..... (In words).....

.....

.....

..... (INCLUDING 15% VAT)

We undertake to commence the Services on receipt of the NBCRFLI's representative's instruction to commence.

We agree to abide by the terms and conditions of this Tender for a period of 90 days from the closing date and undertake that it will not be withdrawn and shall remain open for acceptance by you up to the expiration of the said 90 days.

Unless and until a formal Agreement is prepared and executed, this Tender, together with your written acceptance thereof, shall constitute a binding Agreement between us.

Dated this..... day ofyear

Signature..... in the capacity of

Duly authorised to sign tenders for and on behalf of: Bidder Name

.....

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B.2 SUMMARY OF FEES

Summary of proposed fees.	
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SECTION C

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT RECOMMENDATIONS.

CONDITIONS OF AGREEMENT

(Any resultant Service Level Agreement will be subject to NCRFLI's generic terms and Conditions of Agreement)

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SECTION D

SCOPE OF SERVICES

FOR

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN INDEPENDENT SURVEY TO UNDERSTAND THE NEEDS OF THE INDUSTRY MEMBERS AND SUBMIT RECOMMENDATIONS.

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SPECIFICATIONS

A. BACKGROUND

The National Bargaining Council for the Road Freight and Logistics Industry (“NBCRFLI”) was established in 1946 in terms of Section 27 of the Labor Relations Act 66 of 1995. The NBCRFLI is constituted by the party employer organizations (RFA, NEASA & CEO), and party trade unions (MTWU, SATAWU & TIRISANO). It plays a key role in ensuring labour peace and stability as well as providing an effective service to the road freight and logistics industry stakeholders. It achieves this through:

- **Facilitation and mediation of Industry Collective Agreement.**
- **Setting minimum standards and conditions of employment between employers and employees within the road freight and logistics industry.**
- **Managing the industry’s annual, sick leave and holiday bonus funds.**
- **Provision of Wellness Services, including Trucking Wellness and the Health Insurance Plan.**
- **Provision of Disputes Resolution for the Industry and all these services are provided under the auspices of the Main Collective Agreement.**

The NBCRFLI focus is to improve the quality of service delivered to its stakeholders, namely, industry employers and employees. We achieve this through our various service offerings which are accessible via our eighteen (18) offices countrywide.

B. OBJECTIVES OF THE RFP

The primary objective is to appoint a service provider to conduct an independent scientific study so as to determine and understand the needs of the industry members.

C. SCOPE OF WORK

The scope of work shall include the following:

- Advise the NBCRFLI on how to compile the survey questionnaires so as to ensure that the responses are as accurate as possible.
- Engage the members of the party trade unions so as to determine and understand their needs, which will help the party trade unions to identify gaps and improve their service offerings.

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- Engage the members of the party employer associations so as to determine and understand their needs, which will help the party employer associations to identify gaps and improve their service offerings.
- Engage the industry members so as to determine and understand what the NBCRFLI can do differently in order to add value to the industry members and also remain sustainable in future.
- Prepare and table the Results of the survey together with the necessary recommendations to the Council for deliberations and consideration.