

REQUEST FOR QUOTATION (RFQ)

Request for Quotation:	Credit Assessment Services for the PPECB		
RFQ Number:	RFQ/FIN/ASSESSMENT/2022/10		
Opening Date:	[REDACTED] 23 March 2023		
Closing Date:	[REDACTED] 06 April 2023	Time:	16h00
Contact Person:	Mphumzi Mehlomakulu	Email:	mphumzim@ppecb.com
Bid Validity Period	60 Days		

1. PROJECT PURPOSE

Appointment of a service provider for rendering of efficient customer credit assessments service for the purposes of customer credit eligibility to the PPECB for a period of thirty-six (36) months, with an option to renew for a further twelve (12) months. The services will be required on an ad hoc basis as and when selection for customers is required by the business and daily alerts of changes on customer profiles to be sent to the PPECB.

2. PPECB BACKGROUND

The Perishable Products Export Control Board (PPECB) is a Schedule 3A national public entity established in June 1926. The PPECB conducts its business in terms of the Perishable Products Export Control Act No. 9 of 1983 (PPEC Act).

The PPECB operates as a statutory body established by the Department of Agriculture, Land Reform and Rural Development (DALRRD) under the requirements of the Agricultural Products Standards Act No. 119 of 1990 (APS Act) . As a public entity, the PPECB must adhere to the requirements of the Public Finance Management Act 1 of 1999.

The PPECB currently acts as an independent service provider of quality certification and cold chain management services for producers and exporters of perishable food products. The PPECB's services reduce the risk of producers and exporters of these products. The PPECB controls perishable exports from South Africa.

Customers and stakeholders include producers, producer organizations, pack-houses, manufacturers, exporters, export agents, cold store operators, transport operators, shipping lines, port authorities, port terminal operators, retailers, and governments.

3. SCOPE OF SERVICES REQUIRED:

The service provider must ensure timely delivery of the report, enhanced quality, and quick turnaround in the query resolution process. Each report should be quality controlled and is signed off for delivery. The service provider must be committed to speed of service, accuracy of data, user accessibility and innovation. Reports may vary in content, speed at which they are delivered, level of research required and manner in which they are delivered. All completed reports should be delivered in a manner that complies with the urgency of a specific request.

The service provider must be able to provide credit information for local, cross boarder and international companies and/ or individuals.

1. Client/ Supplier risk profile
2. Historical payment history
3. Financial checks combo (At least 3 main credit bureau databases)
4. Tax status and profile
5. Judgement
6. Affordable credit risk limit
7. Update on latest revisions to the National Credit Act
8. Customer risk insurance
9. Liquidity Status
10. Owners/ Directors of suppliers or clients
11. Tracing Solutions
12. Risk resorting (Provide alerts on a daily basis on changes to customer profiles covering all the above status changes)
13. Upon request to be provided with updated customer profile(on-going) and credit exposure.
14. Access to financial profile
15. Access to trade references

*The portal or system that will be provided to the PPECB should preferably be able to be integrated to Microsoft Dynamics 365 should the need arise.

Description of Solutions/Portal:

The credit assessment solutions proposed must be provided in the format below:

Please provide quotations detailing the assessment tools and costs for

1. the online solutions offered and
2. The turnaround time of providing credit assessments and alerts on possible changes to customer profiles offered that can address the PPECB needs.

Financial Proposal:

Costing breakdown to be provided in the format below:

CREDIT ASSESSMENT SOLUTIONS	COST	
	ONLINE SOLUTION / PORTAL	REPORTS & ALERTS PROVIDED TO THE PPECB.
CREDIT ASSESSMENTS AND VETTING: LOCAL CLIENTS		
Client/ Supplier Risk profile		
Historical Payment History		
Financial Checks Combo (At least 3 main credit bureau databases)		
Tax status and profile		
Judgement		
Affordable credit risk limit		
Update on latest revisions to the National Credit Act		
Customer risk insurance		
Liquidity Status		
Owners/ Directors of Suppliers or clients		
Tracing Solutions		
Risk Reporting (Provide alerts on a daily basis on changes to customer profiles covering all		
Upon request to be provided with updated customer profile(on-going) and credit exposure.		
Access to Financial Profile		
Access to trade references		
CREDIT ASSESSMENTS AND VETTING: INTERNATIONAL AND ABROAD CUSTOMERS		
Client/ Supplier Risk profile		
Historical Payment History		
Financial Checks Combo (At least 3 main credit bureau databases)		
Tax status and profile		
Judgement		
Affordable credit risk limit		
Update on latest revisions to the National Credit Act		
Customer risk insurance		
Liquidity Status		
Owners/ Directors of Suppliers or clients		
Tracing Solutions		
Risk Reporting (Provide alerts on a daily basis on changes to customer profiles covering all		
Upon request to be provided with updated customer profile(on-going) and credit exposure.		
Access to Financial Profile		
Access to trade references		
3. SPECIFY ANY ADDITIONAL COST:		
Totals		
	Total inclusive of VAT	

4. TERMS AND CONDITIONS OF BID

4.1 Bid Submission

All quotations must be submitted to the address and instruction as stipulated in the SBD1 or in the following method:

Via email to Mphumzim@ppecb.com

Or

submitted electronically via Microsoft One Drive and shared with this email address Mphumzim@ppecb.com. This submission must contain all information and documentation relating to the **RFQ/FIN/ASSESSMENT/2022/10**

4.2 Closing Date.

- 4.2.1 Bids must be delivered by the stipulated date and time to the correct address. Late bids will not be accepted for consideration.
- 4.2.2 PPECB reserves the right to extend the closing date. Bidders invited to bid, will be informed should the closing date change.

4.3 Revisions to Request for Quotation.

If it becomes necessary to revise any part of this Request for Quotation, an addendum setting out such revisions will be provided to all Service Providers by an email.

4.4 Bid Validity Period

The quotation must be valid for the duration specified on page 1 (Bid Validity Period).

4.5 CSD Registration

- 4.5.1 Only bid responses from bidders that are registered on the Central Supplier Database (CSD) will be considered.
- 4.5.2 Bidders are required to register on the CSD and to include in the SBD1 the Master Registration Number in order to enable the PPECB to verify the supplier's status on the CSD.
- 4.5.3 Responses from bidders not registered on the CSD at bid closing time or bidders that is prohibited from doing business with the state will be disqualified.

4.6 Acknowledgement and Acceptance

The bidder warrants by signature in this document that the bidder has read and accepts each page of the RFQ, including the terms and conditions of this bid.

4.7 Insurance.

- 4.7.1 The successful Service Provider will be responsible for its work and every part thereof, and for all materials, tools, equipment, appliances, and property of all descriptions issued in connection with this Request for Proposal.

4.8 Response Preparation Cost and Ongoing Engagement

The PPECB is not liable for any costs incurred by a bidder in the process of responding to this Bid Invitation, including on-site presentations.

4.9 Reservations

- 4.9.1 PPECB's decision/s regarding the acceptance or non-acceptance of a quotation shall be final and PPECB is not obliged to furnish any reason for such decision.
- 4.9.2 Proposals shall be considered and evaluated against a pre-determined evaluation value structure determined by PPECB. All Suppliers shall provide all information requested in this RFQ to facilitate the evaluation process. Suppliers shall strictly adhere to the instructions stated in this RFQ.
- 4.9.3 PPECB may, during and after the evaluation of the Proposals and in its sole and absolute discretion, decide to:
- Accept a Quotation other than the lowest priced quotation.
 - Refuse to consider any Quotation not conforming with the requirements of this RFQ;
 - Ask any Service Provider to supply further information after the closing date;
 - Cancel this RFQ or any part thereof at any time.
 - Award the contract pursuant to this RFQ or any part thereof to any one or more Suppliers,
 - Not to award the quotation at all.

4.10 Data Protection

- 4.10.1 Any personal information and Confidential Information of the PPECB which may be provided during the bidding process may only be processed by the bidder for the purposes of this bid.

4.11 News and press releases

- 4.11.1 Bidders or their agents shall not make any news releases concerning this RFP or the awarding of the same or any resulting agreement(s) without the consent of, and then only in co-ordination with PPECB.

4.12 Disclaimer

- 4.12.1 This RFQ is a request for quotation only and not an offer document; answers to it must not be construed as acceptance of an offer or imply the existence of a contract between the parties.
- 4.12.2 By submission of its proposal, bidders shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFQ.
- 4.12.3 The PPECB makes no representation, warranty, assurance, guarantee or endorsements to bidder concerning the RFQ, whether with regard to its accuracy, completeness or otherwise and the PPECB shall have no liability towards the bidder or any other party in connection therewith.

4.13 General Terms and Conditions

- 4.13.1 The attached terms and conditions must be signed and send back with the RFQ response.

5. COMPLIANCE DOCUMENTS

The following documents are required for the proposal to be considered for evaluation process.

1. SBD1 – Invitation to bid;
2. SBD4 - Bidder's Disclosure;
3. Valid Tax Clearance Certificate or Pin;

4. Valid BEE Certificate or EME/QSE Affidavit;
5. SBD6.1 – Preference Point Claim Form;
6. Central Supplier Database Registration (CSD) Report – Proof of CSD registration.

6. RFQ EVALUATION PROCESS AND CRITERIA

All quotations or bids will be evaluated according to the following stages. Should a bidder fail any of the previous stages, they will be disqualified and not be considered for the next evaluation stage.

6.1 Stage 1 – Compliance Evaluation

Bidders must comply with all the terms and conditions of the RFQ and must submit all returnable documents as listed in **Section 5**. Bidders must ensure that they complete and sign returnable documents.

Any Bidder who fails to meet the Compliance Evaluation criteria may be disqualified and not be considered for further evaluation.

No.	Mandatory Criterion	Functional/Technical Evaluation	Comply	Comments / X-Ref in Proposal
1.	N/A		<input type="checkbox"/> YES <input type="checkbox"/> No	
2.	N/A		<input type="checkbox"/> YES <input type="checkbox"/> No	
3.	N/A		<input type="checkbox"/> YES <input type="checkbox"/> No	

6.2 Stage 2 - Functional/Technical Evaluation

A technical evaluation will be conducted to determine the preferred supplier.

Weighted Functional Criteria

Bidders will be evaluated based on the following Weighted Functional Evaluation Criteria.

NO	EVALUATION CRITERION	MINIMUM POINTS	MAXIMUM POINTS
1.	Provides and online verifying and screening tool		50
2.	Complies with the POPI Act (Proof evidence)		10
3.	Turnaround Time on report. ▪ Credit verification at 24 hours - 30		30
4.	Must have access to at least 3 major Credit Bureau Databases ▪ Access to 3 Credit Bureau – 30 ▪ Access to +3 Credit Bureau - 70		70
5.	Must have access to cross boarder and international databases on ▪ Access only to South Africa databases - 5 ▪ Access to South African and cross boarder - 15 ▪ Access to South Africa, Cross boarder and International - 30		30

6.	Ability to select applicable verification available option and reports		20
7.	Adhere to the National Credit Act Service Provider must provide the PPECB with information that will restrict its client from reckless expenditure		40
8.	Online Services The service provider must provide an online facility with search functionality that will access to databases of the main credit bureaus and of previously researched reports at the click of a button. Any on-file or "saved" report should be accessed at any time. The service provider's database should constitute of a minimum 80% of all investigated reports written in South Africa with 70% of on-file information considered current/live.		50
	Total Points		300

Functional Threshold

The minimum functional threshold is [250]. Points. Bidders who score **less** than this threshold will be disqualified and not considered for any further evaluation.

Bidders that passed the previous evaluation stage(s) will be evaluated on one of the following two options:

6.3 POINTS AWARDED FOR SPECIFIC GOALS

- 3.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 3.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
 - (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
 then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.
(Note to organs of state: Where the 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

(Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

No	Specific Goal	Supporting Evidence	Preference Points	Number of points claimed (80/20 system) (To be completed by the bidder)
1	Black-owned enterprises	Proof of B-BBEE status level of contributor, specifically in line with the respective Sector Codes which the company operates - SANAS Approved certificate or Commissioned affidavit or Shareholding certificate	Total Points: 10 % Shareholding and Points allocation out of total of 10 points. 70% to 100% = 10 50% to 69% = 5 Below 50% = 1	
2	Women-owned enterprises;	Proof of B-BBEE status level of contributor, specifically in line with the respective Sector Codes which the company operates - SANAS Approved certificate or Commissioned affidavit or Shareholding certificate	Total Points: 5 % Shareholding and Points allocation out of total of 5 points. 70% to 100% = 5 51% to 69% = 4 30% to 50% = 3 Below 30% = 0	
3	Small business including EMEs or QSEs;	Proof of B-BBEE status level of contributor, specifically in line with the respective Sector Codes which the company operates - SANAS Approved certificate or Commissioned affidavit or Annual Financial Statements	Total Points: 5 EME = 5 QSE = 5 Enterprises with turnover above R50m = 1	
Total Specific Goals			20	

6.4 Stage 4 - Objective Criteria

In terms of Preferential Procurement Regulation 11 and section 2(1)(f) of the Preferential Procurement Policy Framework Act, the PPECB may consider the following objective criteria in the bid award:

- 6.4.1 The risk of fruitless and wasteful expenditure to the PPECB;
- 6.4.2 The risk of an abnormally low bid;
- 6.4.3 The risk of a material irregularity;
- 6.4.4 The PPECB reserve the right not to consider bids from Bidders who are currently in litigation with the PPECB; and
- 6.4.5 The PPECB further reserve the right not to award this tender to any Bidder based on the proven poor record of accomplishment of the Bidder in previous projects within the PPECB and the referee submitted by the Bidder.

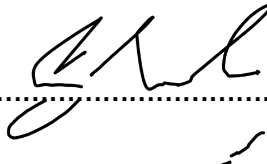
7. SPECIFICATION APPROVAL

Specification Expert:



Date: 20 March 2023

Executive:



Date: 2023-03-22

8. DECLARATION BY THE BIDDER

Only bidders who have completed the declaration below will be considered for evaluation.
RFQ No:[] **for the entire PPECB**

I hereby undertake to render services described in the attached RFQ documents to PPECB in accordance with the requirements and task directives / proposal specifications stipulated in RFQ mentioned above at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the PPECB during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have not participation in any collusive practices with any bidder or any other person regarding this or any other proposal.

I accept that the PPECB may take appropriate action should there be a conflict of interest or if this declaration proves to be false.

I confirm that I have read and accepts each page of this RFQ.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT) Signature

WITNESSES:

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