

TERMS OF REFERENCE FOR THE APPOINTMENT OF A NATIONALLY BASED OFFSITE STORAGE SERVICE PROVIDER FOR THE OFFICIAL RECORDS OF W&RSETA FOR A PERIOD OF FOURTY EIGHT (48) MONTHS, BUT NOT EXCEEDING 30 SEPTEMBER 2030 – WRSCM-2026/2027-0008.



1. INTRODUCTION

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) was established in in terms of the Skills Development Act (as amended). The public entity aims to facilitate the skills development needs of the Wholesale and Retail (W&R) sector through the implementation of learning programs, disbursement of grants and monitoring of education and training as outlined in the National Skills Development Strategy (NSDS) and the National Skills Development Plan 2020 – 2030 (NSDP 2020 – 2030)

2. OBJECTIVE

The W&RSETA seeks to appoint a competent service provider to offer an efficient, secure, and compliant offsite physical records management service across its national footprint, guided by the Skills Development Act, PFMA, and other regulatory frameworks. **The services are required for a period of forty eight (48) months, but not exceeding 30 September 2030.**

The Service Provider must have a **national footprint in records management with off-site storage facilities** (i.e. the service provider that has the required infrastructure and operations to cover all the nine provinces), to ensure secure, efficient, and compliant storage, retrieval, and disposal of physical records while safeguarding their integrity, confidentiality, and availability. Services must be aligned with the National Archives Act, PoPIA, PAIA, PFMA, and ISO 15489 standards.

3. SCOPE OF SERVICES

The Service Provider will be required to render its services as follows:

3.1. W&RSETA Offices

The services will be rendered for the ten (10) W&RSETA Regional Offices and the W&RSETA Head Offices, and the location of the offices is as follows:

Offices	Address
Head Office	1303 Heuwel Road, Riverside Office Park, Hennops House, Centurion, 0157
Eastern Cape	3 Surrey Road, Vincent, East London, 5247
Free State	8 Barnes Street, Westdene, Bloemfontein, 9301
Gauteng North	198 Lunnon Road, Egret Place, Hillcrest Office Park, Pretoria, 0083.
Gauteng South	16 Empire Road, Hill on Empire, Building A, 1 st floor, Parktown, Johannesburg, 2193
KwaZulu Natal	19 Hurst Grove, 3rd Floor, 201b Clifton Place, Musgrave, Durban, 4001
Limpopo	60 Schoeman St, Thabakgolo building, 4th Floor, Polokwane, 0700
Mpumalanga	64 Mandela Street, 202 Parkmed Centre, Emalahleni, 1035
North West	155a Kruger Street, Rustenburg, 0299
Northern Cape	2 Kekewich Drive, Monridge Office Park, Building 6, Monument Heights, Kimberley
Western Cape	27 Willie van Schoor Avenue, Tyger Valley Chambers Building 5, 4th Floor, Tyger Valley, Bellville, 7705

Note: Should any of the offices relocate, the service provider will be notified, at least one month before the intended relocation takes place.

3.2. Secure Transportation and Collection of Records

- Use tracked, secure, and tamper-proof vehicles.
- Apply strict chain-of-custody controls for all collections, with real-time logging and transfer documentation.
- Staff involved in record handling must sign confidentiality agreements.
- Provide for scheduled and ad hoc collection services (including urgent same-day pickups).
- Report incidents of delays, tampering, or loss within 2 hours of occurrence.

3.3. Use of Climate-Controlled, Access-Controlled Storage

- Store records in climate-regulated environments (temperature and humidity) conforming to archival standards.
- Implement waterless fire suppression systems, pest control, water/flood protection.
- Access to storage areas must be electronic-controlled and limited to authorized personnel only.
- Facility must be monitored by 24/7 CCTV, with entry/exit logs maintained and auditable.
- To report on the conducted annual security and infrastructure audits to ensure compliance and fitness for purpose.

3.4. Real-Time Inventory Management System Accessible to W&RSETA

- Provide a secure, cloud-based system with:
 - Inventory tracking throughout all stages of the record lifecycle.
 - Searchable metadata.
- System must comply with ISO/SANS 15489, NARSSA [National Archives and Records Services of South Africa Act], PAIA [Promotion of Access to Information Act], PoPIA [Protection of Personal Information Act], and relevant cybersecurity standards.

3.5. Retrieval Service Within Specified Timeframes

- Urgent requests: fulfilled within same day if requested by no later than 12:00 midday. If requested later than midday, they should be fulfilled by no later than 12:00 midday of the next business day.
- Standard requests: fulfilled within 24 hours.
- Ensure secure packaging, documentation, and verified delivery/receipt processes.
- Digital delivery must be securely encrypted and meet confidentiality requirements.
- Maintain logs of all requests and retrievals for audit and compliance purposes.

3.6. High-Volume Digitization Services

- Be in a position to provide scalable digitization of documents using high-speed scanners with OCR [Optical Character Recognition] functionality.
 - Ensure:
 - File indexing;
 - Output in PDF/A, TIFF or other archival format;
 - Secure handling and return or re-filing of originals;
 - Comply with PoPIA and international standards on digital preservation and data security.
 - Maintain image quality control and document authenticity through integrity checks.
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3.7. Retention Scheduling, Authorized Secure Destruction with Logs

- Implement approved retention schedules and notify W&RSETA when records are due for disposal.
- Destruction must only proceed after written authorization by W&RSETA officials.
- Use certified, secure methods for destruction (e.g. crosscut shredding, incineration, or secure erasure).
- Provide disposal log indicating:
 - Items destroyed;
 - Method and date;
 - Authorized approver;
 - Reference numbers for audit purposes.

- Maintain destruction logs for 10 years post-disposal, or as agreed.

3.8. Training

- Provide onboarding training, system manuals, and ongoing technical support as and when requested at the commencement of the contract, and as and when requested by W&RSETA.

4. DATA BREACH PROTOCOLS

- 4.1.** Provider must have a documented **Data Breach Response Plan** in compliance with PoPIA, and this should be shared with W&RSETA upon request.
- 4.2.** Any suspected or confirmed breach involving W&RSETA records must be reported within **4 hours** of discovery and be investigated and documented within 24 hours.
- 4.3.** This should be followed by a root cause analysis and mitigation plan within seven days.
- 4.4.** Notify the Information Regulator (where required by PoPIA) and cooperate in any relevant investigations.
- 4.5.** Implement proactive cybersecurity measures including encryption, firewalls, access controls, and regular penetration testing.

5. CONTRACT AND PERFORMANCE MANAGEMENT

- 5.1.** The appointed Service Provider will be required to sign a Service Level Agreement (SLA), which will be used to monitor and evaluate the performance of the Service Provider.
 - 5.1.1.** The SLA among others will cover:
 - Specific measurable targets (e.g., retrieval turnaround times, system uptime, destruction cycles).
 - Penalties for non-performance (e.g., financial penalties, service credits, termination clauses).
 - Escalation protocols for repeated breaches.
 - 5.1.2.** Compliance to the SLA will be reviewed quarterly.
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5.1.3. Performance Monitoring will require the following, among others:

- Service provider to submit quarterly performance reports detailing.
- Retrieval response times.
- Collection and delivery records.
- System uptime/downtime.
- Compliance incidents and resolutions.
- Participate in quarterly review meetings with W&RSETA to assess SLA performance.
- Provider must maintain an acceptable service level compliance rate at all times.

6. LEGISLATIVE AND REGULATORY COMPLIANCE SPECIFICATIONS

6.1. The offsite records storage facility and service provider must comply with all applicable South African laws, standards, and regulations to ensure the secure, confidential, and efficient handling, storage, and retrieval of records. This includes, but is not limited to, the following:

- **National Archives and Records Service of South Africa Act, 1996 (Act 43 of 1996):** The provider must comply with the requirements for the care, custody, and control of public records, including classification, retrieval, and destruction procedures aligned with approved Records Retention Schedules.
 - **Protection of Personal Information Act, 2013 (Act 4 of 2013):** Confidentiality and data protection must be guaranteed throughout the storage lifecycle. The facility must have appropriate access controls, surveillance, and handling procedures to prevent unauthorized access to personal and sensitive information.
 - **SANS 10400 & The National Building Regulations and Building Standards Act, 1977 (Act 103 of 1977):** The facility must comply with national building regulations to ensure structural integrity, fire safety, and environmental control suitable for long-term records preservation.
 - **Occupational Health and Safety Act, 1993 (Act 85 of 1993):** The storage facility must maintain a safe and hazard-free environment for staff and visitors, with clearly demarcated access routes, emergency exits, and fire evacuation protocols.
 - **Fire Protection Compliance:** The storage facility must be equipped with certified fire detection and suppression systems and comply with all **local fire regulations** and fire department requirements.
 - **Municipal By-Laws:** The provider must comply with all relevant municipal by-laws, including zoning, safety, waste disposal, and noise regulations.
 - **Security Measures:** The facility must have robust, layered physical and electronic security measures, including 24/7 CCTV surveillance, biometric access control (or equivalent), alarm systems, and secure perimeter fencing.
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- **Environmental Controls:** Temperature and humidity control systems must be in place to ensure long-term preservation of paper and electronic records in line with archival standards.

Failure to comply with the above specifications may lead to termination of the contract. W&RSETA reserves the right to conduct on-site inspections and request proof of compliance at any stage during the contract period.

7. EXPECTED TERMS OF AGREEMENT AND SPECIFICATION

The terms and conditions of the contract will be managed through the SLA to be concluded between the W&RSETA and the successful bidder.

8. PRICING

- 8.1. Proposals must include all costing inclusive of VAT.
- 8.2. **All bidders are required to submit their cost breakdown in the table herein below marked as Annexure A.**

9. EVALUATION PHASES

- 9.1. The evaluation of tenders will be performed using the 80/20 principle.
- 9.2. The bid proposals received will be evaluated in different phases to arrive at the final phase of the bid award, and the phases will be as follows:

9.2.1. Phase 1: Compliance Evaluation Criteria

9.2.1.1. Stage 1: Administrative Requirements

- In this phase, all bids received will be verified for compliance and completeness of the submitted proposal per the below set of administrative requirements.
- Invitation to Bid (SBD 1) must be fully completed.
- Completed and signed SBD 4 (Declaration of Interest),
- Completed SBD 6.1 (Preference Claim Certificate), accompanied by the original or certified B-BBEE Status
- Proof of registration on the Central Supplier Database.
- SARS PIN for confirmation of tax registration status

9.2.1.2. Stage 2: Mandatory Requirements

- National or Provincial Archives Inspection Letter confirming that the bidder has been declared suitable to store records of archival value on behalf of public entities. The letter must not be older than three (3) years at the time of submission. These inspection letters must be submitted in respect of each site that will be used for the storing of W&RSETA records.
- Technical Specification document in use by the bidder [with output report] to confirm capacity for Optical Character Recognition (OCR) document imaging.

9.2.2. Phase 2: Detailed Technical Evaluation Criteria and Point Allocation

In this phase, all bids that meet all the requirements in terms of compliance and completeness of the submitted proposals per the set of mandatory requirements on Phase One (01) progress to Phase Two (02) for further evaluation per the below-set evaluation criteria as captured in **Annexure B: Technical Evaluation Assessment**.

ANNEXURE A: PRICING SCHEDULE FOR OFF-SITE STORAGE SERVICES

Instructions to Bidders:

- Price Escalation is applied at the anniversary of the contract.
- **Bidders must provide all-inclusive prices (packaging, fuel levies, tolls, insurance, shipment, and all other applicable charges).**
- All quoted rates must be VAT inclusive.

CATEGORY	DESCRIPTION	UNIT OF MEASURE	YEAR	YEAR	YEAR	YEAR	YEAR
			2026 -27	2027 -28	2028 -29	2029-30	UNIT PRICE
a) Supply of stationary	Supply of new boxes with lids	Per Box (SM2)	R -	R -	R -	R -	R -
		Per Box (SM3)	R -	R -	R -	R -	R -
	Per Box (SM4)	R -	R -	R -	R -	R -	R -
	Labels	Per roll	R -	R -	R -	R -	R -
	SUB TOTAL 1		R -	R -	R -	R -	R -
b) General Operational costs	Collection & secure transportation of records from W&RSETA offices or any other site to the desired site.	Per Box (SM2)	R -	R -	R -	R -	R -
		Per Box (SM3)	R -	R -	R -	R -	R -
	Indexing, cataloguing, and barcoding of records into inventory system	Per Box (SM4)	R -	R -	R -	R -	R -
		Per Box	R -	R -	R -	R -	R -
	SUB TOTAL 2		R -	R -	R -	R -	R -
c) Monthly storage costs	Storage of standard records in climate-controlled, access-controlled facility	Per Box (SM2)	R -	R -	R -	R -	R -
		Per Box (SM3)	R -	R -	R -	R -	R -
		Per Box (SM4)	R -	R -	R -	R -	R -
	SUB TOTAL 3		R -	R -	R -	R -	R -

d) Retrieval & Delivery Costs	Retrieval & delivery of a standard records (within 24 hours)	Per Box (SM2)	R	-	R	-	R	-	R	-
		Per Box (SM3)	R	-	R	-	R	-	R	-
		Per Box (SM4)	R	-	R	-	R	-	R	-
SUB TOTAL 4			R	-	R	-	R	-	R	-
e) Digitization Services	OCR Scanning (black & white)	Per Page	R	-	R	-	R	-	R	-
	OCR Scanning (colour)	Per Page	R	-	R	-	R	-	R	-
	File indexing & archival format conversion (PDF/A, TIFF)	Per file	R	-	R	-	R	-	R	-
SUB TOTAL 5			R	-	R	-	R	-	R	-
f) Secure Destruction	Secure destruction (crosscut shredding)	Per KG	R	-	R	-	R	-	R	-
			R	-	R	-	R	-	R	-
SUBTOTAL 6			R	-	R	-	R	-	R	-
GRAND TOTAL (subtotal 1+2+3+4+5+6) =			R	-	R	-	R	-	R	-

TOTAL RATES (OVER FOUR YEARS): R _____

ANNEXURE B: TECHNICAL EVALUATION		
80/20 preferential point system will be applied. The Technical threshold for this bid is 80 points. Bids that fail to meet the 80 points threshold will not be considered for Preference and Price Evaluation.		
Evaluation Criteria	Submission requirements	Points
1. Capacity to Deliver	Bidder must provide at least four (4) reference or appointment letters from client organisations to prove that the bidder has in the past five years provided offsite storage to another organisation that has branches in different provinces.	50 Points
	0=0 points Bidder provided no reference or appointment letters from client organizations to prove that the bidder has in the past five years provided offsite storage to another organisation that has branches in different provinces.	
	1=20points Bidder provided one (1) to three (3) reference or appointment letters from client organizations to prove that the bidder has in the past five years provided offsite storage to another organisation that has branches in different provinces.	
	2=40 points Bidder provide four (4) reference or appointment letters from client organizations to prove that the bidder has in the past five years provided offsite storage to another organisation that has branches in different provinces.	
	3=50 points Bidder provided more than four (4) reference or appointment letters from client organizations to prove that the bidder has in the past five years provided offsite storage to another organisation that has branches in different provinces.	
2. National Footprint	Submit proof of address letters from the municipalities or utilities statements, also from the sites or depots the service provider operates from, nationally.	40 Points
	0=0 points Less than five (5) sites located to service entities that have a national footprint	
	1=20 points Five (5) active sites located to service entities that have a national footprint	
	2=32 points Six (6) to eight (8) active sites strategically located to service entities that have a national Footprint	
	3=40 points Nine (9) or more active sites strategically located to service entities that have a national footprint	
3. Live Records Inventory System Accessible to W&RSETA	Submit proof of a live inventory system by providing system specifications, manual, and redacted screenshots from the system. All three items (supporting documents) must be submitted as listed in the supporting documents column of this criterion. Failure to submit any of these three required documents will result in the bidder being allocated zero points on this criterion. The required system must enable W&RSETA to track and retrieve the off-site stored records of W&RSETA. This system should be up and running, and ready for deployment to the W&RSETA upon the awarding of the tender.	10 Points
		<ul style="list-style-type: none"> • System Specification documentation, • System User Manual(s), • Redacted screenshots

			from the system.
0=0 points	No live inventory system available		
1=10 points	Live system is available and will be provided to W&RSETA		