



Request for Proposal:

**APPOINTMENT OF A SERVICE
PROVIDER FOR THE OFFSITE
ARCHIVING OF COEGA DEVELOPMENT
CORPORATION (CDC) DOCUMENTS
AND RECORDS.**

Contract N^o
CDC/99/25

Classification: Public

19 MAY 2025

Name of Bidder: _____



DOCUMENT INFORMATION SHEET

Title of Document : *Request for Proposals -Appointment of a Service Provider for the Offsite Archiving of Coega Development Corporation (CDC) Documents and Records.*

Type of Document : *Request for Proposal*

Contract Number : *CDC/99/25*

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Prepared for : *Bids Specification Committee*

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DOCUMENT CONTROL SHEET

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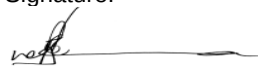
PROJECT NAME : *Appointment of a Service Provider the Offsite Archiving of Coega Development Corporation (CDC) Documents and Records.*

DOCUMENT TITLE : *Request for Proposal - Appointment of a Service Provider for the Offsite Archiving of Coega Development Corporation (CDC) Documents and Records.*

DOCUMENT No. : CDC-SBU-RFP-001-25

SIGNING OF THE ORIGINAL DOCUMENT

We, the undersigned, accept this document as a stable work product to be placed under formal change control as described by the Change Control Procedure document.

ORIGINAL	Prepared by	Reviewed by	Approved by
Date: 19 May 2025	Name: Xolani Gwele Signature: Digitally Signed by: Xolani Gwele Quality Manager 4f18a2ba-0796-4112-a7d9-db819843e8e7 IP Address: 10.0.56.210 Date: 2025/05/20 3:45:27 PM	Name: Simphiwe Silwana Signature: Digitally Signed by: Simphiwe Silwana Sustainability Manager: Safety- Health- Environment & Social Impact d94c9186-b4f3-4805-8512-de16421e38bc IP Address: 10.0.56.37 Date: 2025/05/20 4:37:09 PM	Name: Fezile Ndema Signature:  Fezile Ndema d49b91ab-9704-4c8c-b57e-1b2e4c8a7cdb 2025/05/21 9:24:54 AM

Distribution:	Bid Specification Committee
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REVISION 2	Name:	Name:	Name:
Date:	Signature:	Signature:	Signature:

REVISION 3	Name:	Name:	Name:
Date:	Signature:	Signature:	Signature:

REQUEST FOR PROPOSAL

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REQUEST FOR PROPOSAL

CONTRACT NUMBER: CDC/99/25

CONTRACT DESCRIPTION:

APPOINTMENT OF A SERVICE PROVIDER FOR THE OFFSITE ARCHIVING OF COEGA DEVELOPMENT CORPORATION (CDC) DOCUMENTS AND RECORDS.

The Coega Development Corporation (CDC) is headquartered in the City of Gqeberha, Nelson Mandela Bay Municipality, South Africa, with a strategic operational footprint in South Africa and beyond the borders in the African continent. The CDC's vision is to be the leading catalyst for the championing of socio-economic development. This it seeks to achieve through the development and operation of the 9 003-hectare Coega Special Economic Zone (SEZ), a transshipment hub and a leading investment destination in Africa, providing highly skilled competence and capacity for the execution of quality complex infrastructure and related projects throughout South Africa and selected markets on the African continent, and advisory on the development of industrialization and logistics zones. The CDC's advanced capabilities are successful enablers in economic zone development and management, real assets management, infrastructure planning and development for National, Provincial, Local Government Departments and State-owned Entities, technology integration while realising related socio-economic impact areas such as skills and SMME development. The foundational culture of the CDC's approach, backed by core values, is innovation and continuous improvement.

The CDC attracts local and foreign investment into the Coega Special Economic Zone (SEZ) and the Nelson Mandela Bay Logistics Park (NMBLP); conceptualises and develops complex, multi-disciplinary projects; and provides programme management, strategic advisory, economic research and human capital services. It manages the entire development and service provision through innovative approaches that combine multi-disciplinary skills.

INVITATION AND SCOPE OF WORK

The Coega Development Corporation (CDC) is committed to maintaining an efficient and compliant records management system in line with its Records Management Policy and ISO 9001 Quality Management System (QMS) requirements. Proper records management ensures the integrity, security, and accessibility of documents while supporting legal compliance, business continuity, and operational efficiency.

As part of its document control and retention schedule, the CDC seeks to appoint a Service Provider to provide CDC with their offsite storage, retrieval, and secure disposal of records in accordance with regulatory and operational requirements. The storage facility must be based in Nelson Mandela Bay Metropolitan Municipal Area, Eastern Cape for ease of access to documents. The offsite storage facility must be owned or formally leased by the Service Provider at the time of bid submission or prior to contract award and retained as such for the duration of the contract period (60 months).

The appointed service provider will be expected to implement industry best practices for document archiving, indexing, retrieval, and disposal while ensuring compliance with ISO 9001:2015 Clause 7.5

(Documented Information), which mandates organizations to manage documented information in a manner that preserves its confidentiality, integrity, and availability.

Through this Request for Proposal (RFP), the CDC seeks a qualified and experienced service provider with a proven track record in offsite records management, secure storage facilities, and compliance with applicable legal and regulatory frameworks governing document retention and archiving.

The appointed service provider will be responsible for the following services:

2.1 Shredding and Confidential Shredding of Documents

- Secure shredding services for CDC's obsolete documents.
- Confidential shredding of classified and sensitive records, ensuring compliance with legal and regulatory requirements.
- Provision of shredding certificates for compliance and auditing purposes.

2.2 On-Site File Management

- Regular on-site assistance with file management before offsite storage.

2.3 Supply of Archiving Materials

- Supply of archiving materials, including:
 - Archive boxes with lids
 - Stationery for labeling and classification
 - Labels for tracking and inventory control
 - Secure storage containers for document handling

2.4 Scanning of Documents upon request

- Digital conversion of physical records through scanning.
- Secure storage and access to scanned records

2.5 Filing Cabinets and Bulk Filers

- Supply of filing cabinets and bulk filers for on-site document storage and organization.
- Periodic maintenance and assessment of storage solutions to ensure efficiency.

2.6 Transportation

- Transportation of documents from the client's premises to the offsite facility.

2.7 Offsite Archiving

- Secure offsite archiving of documents in compliance with applicable legal and regulatory standards.
- The service provider must ensure that all records are stored in a secure, climate-controlled environment, with appropriate access controls and disaster recovery measures in place.
- The provider shall maintain accurate records of all archived materials.

The duration of the contract is sixty (60) months.

CONDITIONS OF TENDER

- (a) The CDC's Procurement Policy and Procedures shall apply.
- (b) The following shall apply:
 - (i) Public Finance Management Act (PFMA);

- (ii) National Treasury Regulations;
 - (iii) Public Procurement Act, 2024
 - (iv) Preferential Procurement Regulations, 2022;
 - (v) National Qualifications Framework Amendment Act, (12 of 2019);
 - (vi) Skills Development Act, (97 of 1998);
 - (vii) Occupational Health and Safety Act and Regulations, Act (85 of 1993);
 - (viii) Compensation for Occupational injuries and disease Act (130 of 1993);
 - (ix) B-BBEE Act Number 53 of 2003 (as amended by Act number 46 of 2013); and
 - (x) NEMA National Environmental Management Act (107 of 1998);
 - (xi) Disaster Management Act (57 of 2002);
 - (xii) Heritage Resources Act, (Act No. 25 of 1999);
 - (xiii) Protection of Personal Information Act, (Act No. 4 of 2013);
 - (xiv) Standards Act, (Act No. 8 of 2008);
 - (xv) National Archives Act, (Act No. 24 of 1996)
 - (xvi) Any other applicable legislation.
- (c) The 80/20 preference point system will be used where points allocation will be as follows:
- Price – 80.00,
 - Specific Goals – 20.00
- (d) Bidders must be VAT registered, and bids must be submitted VAT inclusive. Non-VAT vendors who submit bids for contracts that would, if successful, take their annual turnover above the threshold of R 1 million are obliged to include VAT in the prices quoted and must therefore immediately upon award of the contract register with the South African Revenue Services (SARS) as VAT vendors. The award of contract would be conditional pending the successful bidder submitting proof of registration as a VAT vendor with SARS.
- (e) Bidders (all the members in the Bidding Team in the case of Consortia or Joint Ventures) must provide proof of registration on the National Treasury's Central Supplier Database (CSD) or provide a Treasury CSD registration number e.g. MAAA0.
- (f) CDC will only award the tender to a bidder who is tax compliant. The tax compliance status of the bidders (and all the members in the Bidding Team in the case of Consortia or Joint Ventures) will be verified through CSD and South African Revenue Services (SARS) website.
- (g) Bidders with less than 51% black shareholding (QSEs & Generics) are to submit a valid SANAS Accredited B-BBEE Verification Certificate (with the full applicable B-BBEE elements). Bidders with more than 51% black shareholding (EMEs & QSEs) are to submit an affidavit stamped and signed by a Commissioner of Oaths as per the DTI B-BBEE template. In case of a JV, a consolidated B-BBEE certificate must be submitted as well as individual B-BBEE Certificates/affidavit of their entities to confirm the type of enterprise.
- (h) Bidders must confirm their company registration with Companies and Intellectual Property Commission (CIPC) (formerly CIPRO) as CDC will not award any bid to any business that appears on the CIPC List of de-registered businesses. The CDC may verify company registration with CIPC through BizPortal.
- (i) Bidders must complete and sign the POPI Act consent form.

- (j) The CDC will not award more than five (5) active projects to one bidder, unless three (3) projects have reached 80% completion stage and beyond. Capacity assessment may be conducted in an event that the recommended bidder is the only responsive service provider and has already been awarded five (5) contracts.
- (k) Bidders will be evaluated on functionality and are expected to meet a minimum of 60 points threshold to be evaluated further. The evaluation criteria for measuring functionality and weight of each criterion are provided under Table A1 & A2 of the RFP document.
- (l) The successful bidder will be required to comply with the National Environmental Management Act, (107 of 1998), National Heritage Resources Act, (25 of 1999), Occupational Health and Safety Act and Regulations, Act (85 of 1993), Compensation for Occupational Injuries and Disease Act, Act (130 of 1993), Disaster Management Act, Act (57 of 2002), Protection of Personal Information Act, (Act No. 4 of 2013 and Standards Act, (Act No. 8 of 2008),), NEMA National Environmental Management Act (107 of 1998) and, all other relevant and applicable legislations throughout the duration of the contract.
- (m) The bidder's storage facility must be located within the Nelson Mandela Bay Metropolitan Municipality Area jurisdiction. Proof of address must be submitted, i.e. a valid and signed lease agreement, title deed or municipal statement(s), which will be verified accordingly. The municipal statement must not be older than three (3) months from date of submission and must be in the name of the bidder.

Please note: CSD, CIPC registration documents, Letterheads, letters from third parties, search engines, statements, letters from third parties etc. will not be considered as proof of office establishment. Failure to comply with this requirement will render the bid non-responsive and may lead to disqualification.
- (n) Public servants are prohibited from doing any form of business with organs of state, whether in their own capacity as individuals or through companies in which they are directors. Verification will be done, and bidders will be disqualified should they be found to be in contravention with the regulations.
- (o) It is incumbent upon and the responsibility of the Prospective Bidders to submit their full and correct contact details when they download the RFP Document to enable any communication that the CDC might need to issue to all the Prospective Bidders during the bidding process to be realised. The CDC will not be accountable for any such omission or failure by the Prospective Bidders.
- (p) Any misrepresentation of information will lead to immediate disqualification of the Bidder's Submission. It is imperative that the duly authorised person conducts quality control on all the documentation to be submitted to the CDC as part of this RFP and signs the submission as a correct and sound documentation that the CDC could put its reliance on.
- (q) Bidders are requested to submit a tightly or securely packed bid document to avoid loose papers, with index and dividers. Bidders may use binders/ arch liver files and/or heavy-duty staplers to bind their bid document. Submission with loose papers shall be rejected.
- (r) The CDC reserves the right, in its sole discretion, to reject any bid where it appears to the Employer/Client that the bidder does not comply with any of the requirements set out above.

- (s) The tender validity period for this contract is **twelve (12) weeks** from closing date.

The RFP documents will be available for download from the CDC website (www.coega.co.za), Provincial tender bulletin and National Treasury e-tender portal publication from **Friday, 23 May 2025** at no cost. It is the bidder's responsibility to ensure the document is downloaded correctly and submitted as per the original document sequence as CDC will not be responsible for any inconsistencies on the tender document which may lead to the disqualification of the bidder.

Potential bidders will be required to provide their email addresses on the CDC website before downloading the documentation for correspondence purposes. Potential bidders must therefore ensure that the email addresses are correct.

A **Mandatory** Briefing Meeting will be held on **Monday, 02 June 2025** from **10H00** at the following address:

Coega Development Corporation Main Office (Enkundleni Boardroom), Coega Business Centre, Cnr. Alcyon Road & Zibuko Street, Zone 1 Coega SEZ, Gqeberha, 6001.

The briefing notes will be packaged and published on the CDC website.

Queries relating to this RFP may be addressed to Ms. Zine Mtanda, Unit Head: Supply Chain Management strictly via e-mail: tenderscdc9925@coega.co.za between the period of **23 May 2025 to 10 June 2025**. No new queries received **after 10 June 2025** will be considered.

The **closing** date and time for the receipt of complete bid documents is on **Tuesday, 17 June 2025** at **12H00**.

One original completed bid document shall be placed in a sealed envelope clearly marked with **CONTRACT NUMBER: CDC/99/25 - APPOINTMENT OF A SERVICE PROVIDER FOR THE OFFSITE ARCHIVING OF COEGA DEVELOPMENT CORPORATION (CDC) DOCUMENTS AND RECORDS**.

Bids are lodged and submitted at **Document Control office**, at the **Coega Development Corporation Main Office, Coega Business Centre, Cnr. Alcyon Road & Zibuko Street, Zone 1 Coega SEZ**, RFP documents will not be opened in public; and no late submissions will be considered.

Incomplete RFP Document and failure to provide mandatory information required in this bid will result in the submissions being deemed null and void and shall be considered non-responsive.

Telegraphic, telexed, tippexed, facsimiled, emailed submissions will not be accepted.

No telephonic or any other form of communication with any CDC member of staff, other than the individual named above, relating to this request for tender will be permitted. All enquiries regarding this tender must be in writing only and must be directed to:

Ms Zine Mtanda, Unit Head: Supply Chain Management; e-mail: tenderscdc9925@coega.co.za

The CDC reserves the right not to accept the lowest proposal in part or in whole or any proposal.

SBD 1

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	CDC/99/25	CLOSING DATE:	17 June 2025	CLOSING TIME:	12H00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE OFFSITE ARCHIVING OF COEGA DEVELOPMENT CORPORATION (CDC) DOCUMENTS AND RECORDS.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Coega Business Centre, Cnr Alcyon Rd and Zibuko Street, Zone 1, Coega SEZ, Gqeberha					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	SCM Unit Head: Zine Mtanda		CONTACT PERSON	N/A	
TELEPHONE NUMBER	Not allowed to phone		TELEPHONE NUMBER	N/A	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	tenderscdc9925@coega.co.za		E-MAIL ADDRESS	tenderscdc9925@coega.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
1. ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		2. ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				☐ YES ☐ NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				☐ YES ☐ NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				☐ YES ☐ NO	
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:	
2.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
2.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
2.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
2.4.	THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6	WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7	NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g., company resolution)

DATE:

1. INTRODUCTION

The Coega Development Corporation (CDC) is committed to maintaining an efficient and compliant records management system in line with its Records Management Policy and ISO 9001 Quality Management System (QMS) requirements. Proper records management ensures the integrity, security, and accessibility of documents while supporting legal compliance, business continuity, and operational efficiency.

As part of its document control and retention schedule, the CDC requires the services of a Service Provider to manage the offsite storage, retrieval, and secure disposal of records in accordance with regulatory and operational requirements. This initiative is essential to optimize on-site storage capacity, improve records accessibility, and enhance information security.

The appointed service provider will be expected to implement industry best practices for document archiving, indexing, retrieval, and disposal while ensuring compliance with ISO 9001:2015 Clause 7.5 (Documented Information), which mandates organizations to manage documented information in a manner that preserves its confidentiality, integrity, and availability.

Through this Request for Proposal (RFP), the CDC seeks a qualified and experienced service provider with a proven track record in offsite records management, secure storage facilities, and compliance with applicable legal and regulatory frameworks governing document retention and archiving.

2. SCOPE OF WORK

The storage facility must be based in Nelson Mandela Bay Metropolitan Municipal Area, Eastern Cape for ease of access to documents. The offsite storage facility must be owned or formally leased by the Service Provider at the time of bid submission or prior to contract award and retained as such for the duration of the contract period (60 months).

The duration of the contract is sixty (60) months.

The appointed service provider will be responsible for the following services:

2.1 Shredding and Confidential Shredding of Documents

- Secure shredding services for CDC's obsolete documents.
- Confidential shredding of classified and sensitive records, ensuring compliance with legal and regulatory requirements.
- Provision of shredding certificates for compliance and auditing purposes.

2.2 On-Site File Management

- Regular on-site assistance with file management before offsite storage.

2.3 Supply of Archiving Materials

- Supply of archiving materials, including:
 - Archive boxes with lids
 - Stationery for labeling and classification
 - Labels for tracking and inventory control

- Secure storage containers for document handling

2.4 Scanning of Documents upon request

- Digital conversion of physical records through scanning.
- Secure storage and access to scanned records

2.5 Filing Cabinets and Bulk Filers

- Supply of filing cabinets and bulk filers for on-site document storage and organization.
- Periodic maintenance and assessment of storage solutions to ensure efficiency.

2.6 Transportation

- Transportation of documents from the client's premises to the offsite facility.

2.7 Offsite Archiving

- Secure offsite archiving of documents in compliance with applicable legal and regulatory standards.
- The service provider must ensure that all records are stored in a secure, climate-controlled environment, with appropriate access controls and disaster recovery measures in place.
- The provider shall maintain accurate records of all archived materials.

3 PRICING SCHEDULE

Item	Quantity	Basic Specifications	Unit R Excl. VAT	Total R Excl. VAT
1	1	STORAGE COSTS		
1.1		Standard Box (Lever Arch Document Box - 460 x 340 x 285mm) Rental per Month		
1.2		Non -Standard Box Rental per Month		
2	1	INITIAL COSTS – NEW BOXES TAKEN IN		
2.1		Packing of Boxes		
2.2		Indexing and cataloguing per line item		
2.3		Labelling per File / Box Bold and black marking pen		
2.4		Verification of Files / Box		
2.5		New Box – Collection Fee		
2.6		New Box – Handling Fee		
2.7		Data Capture per Line Item		
2.8		Black Cable Ties (300mm x 4.8mm)		
2.9		Security Seals (28cm – 30cm)		
2.10		Rubber bands (no. 64) per 500g		
3	1	GENERAL ACHIVING COSTS		
3.1		Handling Fee per Box/File - Incoming		
3.2		Handling Fee per Box/File - Outgoing		
3.3		Search Fee		
3.4		Scan / E-mail Fee per Page (A4)		
3.5		Scan / E-mail Fee per Page (A3)		
3.6		Photocopies / Printouts per Page (A4)		
3.7		Photocopies / Printouts per Page (A3)		
3.8		Index / Destruction Reports		
3.9		Permanent Withdrawal per Box / File		
3.10		Destruction Fee per Box / File		
3.11		Destruction Fee per kg		
3.12		Destruction Certificate		

3.13		Delivery / Collection Fee within 50km Radius		
3.14		Express / Same Day Delivery within 50km Radius		
4		PROVISIONAL SUM		
4.1	1	Once-off Take-on cost of 4520 new boxes	R 157 683.00	
Total				
VAT				
Total Inc. VAT				

NOTE: The total sum quoted by the bidder will be used for the purposes of evaluating bids and determining the contract award. However, the contract will be implemented on a rate-based basis, and payments will be made in accordance with the actual quantities of work or services delivered, as verified by CDC.

CDC/99/25 – APPOINTMENT OF A SERVICE PROVIDER FOR THE OFFSITE ARCHIVING OF COEGA DEVELOPMENT CORPORATION (CDC) DOCUMENTS AND RECORDS.

(Total Contract Amount in Words including VAT)

for the Contract Number: CDC/99/25 – APPOINTMENT OF A SERVICE PROVIDER FOR THE OFFSITE ARCHIVING OF COEGA DEVELOPMENT CORPORATION (CDC) DOCUMENTS AND RECORDS.

Name of Organisation: _____

Name of Authorised Person: _____

Capacity in Organisation: _____

Signature: _____

Date: _____

Witness:

Name: _____ Signature: _____ Date: _____

4 DURATION OF THE CONTRACT

The Service Providers will be engaged for an indicative sixty (60) months.

5 BID EVALUATION CRITERIA

The evaluations of bids will be carried out in five (5) stages as indicated in the **Table 2** below.

Table 2: Stages and areas of Assessment of Bidders' Submissions to this RFP.

Stage of Assessment	Area of Assessment	Requirements
Stage 1	Timeous Submission	- All the submissions must be received on time before the closing date and time reflected on the RFP Invitation (First page of this RFP Document). - Bids must be submitted in a sealed envelope clearly marked and bid document securely packed. Refer to Section 5.1
Stage 2	Responsiveness Assessment	Submissions will be considered as being non-responsive if the required documentation/information has: - Not been provided or submitted partially complete; - Been altered and not initialled by the duly authorised person; - Correcting fluid used to alter some information; - Not meeting the mandatory requirements of this RFP Document; - Has not been signed by the duly authorised Bidder(s)' Representative. Refer to Section 5.2
Stage 3	Functionality assessment	Bidder(s) will be evaluated on functionality and are expected to meet the minimum of 60 point threshold in order to be evaluated further. Refer to Section 5.3, Table A1 and Table A2.
Stage 4	Quantitative Assessment	This is aimed at assessing if the Bidder(s) that have gone through the Responsiveness Assessment in Stage 2; and will be further evaluated on Price and Specific Goals. 80/20 preference point system will be applied, whereby the points for price will be 80 for all Bidder(s). Refer to Section 5.4
Stage 5	Qualitative Assessment	This is aimed at assessing if the Bidder(s) that have gone through the Quantitative Assessment in Stage 4 pose any commercial risks. Refer to Section 5.5.

5.1. Stage 1 – Timeous Submissions

- (a) All the bids must reach the CDC by the stated date and time of closure of this RFP Process.

- (b) Bids must be submitted in a sealed envelope clearly marked and bid document securely packed. Bid document must be securely bound with no loose pages. Bids with loose pages will be eliminated.
- (c) Any late submission will be returned unopened to the respective bidder.

5.2. Stage 2 – Responsiveness Assessment

- (a) In order for the bidder to be considered as being responsive and eligible for the next stage of assessment, it has to pass the Responsiveness Assessment Stage. This will be determined from the submitted bid and Returnable Documents meeting the mandatory requirements that are listed in **Table 3** below.
- (b) If any of the items reflected in **Table 3** are not furnished fully, filled in erasable ink or not signed and initialled on each page by the duly authorised bidder's representative, then the submitted bid will be considered as null and void and shall be considered as non-responsive and will therefore not be assessed further.

Table 3: MANDATORY REQUIREMENTS

NO.	DESCRIPTION
(1)	Completed and Signed SBD 1 FORM: Invitations to Bid . Bidders must provide proof of Central Supplier Database (CSD) registration or CSD number (MAAA....). In case of a Joint Venture/Consortium the information of all the entities CSD registration numbers should be reflected on the SBD 1 Form.
(2)	Completed and signed Bidders Disclosure Form (SBD 4) . In case of a Joint Venture/Consortium, a separate Bidders Disclosure Form (SBD 4) in respect of each party to the JV must be completed and submitted.
(3)	Completed and Signed Certificate of Authority of Signatory to be signed by all bidding organisations or entities. Proof of authority to sign may be submitted in the form of Company resolution.
(4)	Original fully completed and handwritten, priced and signed financial proposal / Pricing Schedule clearly legible with permanent ink. Pricing schedule should be initialled on each page by the duly authorised bidder's representative.
(5)	Bidder must attend the mandatory briefing meeting. One delegate may not represent more than one company in the briefing meeting.

Failure to submit and complete all mandatory information will result in submissions being deemed null and void and shall be considered “non-responsive” and therefore not considered.

Table 4: ADDITIONAL INFORMATION REQUIRED

NO.	DESCRIPTION	YES	NO
(1)	Bidders with less than 51% black shareholding (QSEs & Generics) are to submit a valid SANAS Accredited B-BBEE Verification Certificate (with the full applicable B-BBEE elements). Bidders with more than 51% black shareholding (EMEs & QSEs) are to submit a sworn affidavit stamped and signed by the Commissioner of Oaths as per the DTI B-BBEE template. In case of a JV, a consolidated B-BBEE certificate must be submitted as well as individual B-BBEE Certificates/affidavit of their entities to confirm the type of enterprise.		
(2)	Completed and signed Form SBD 6.1 preference points claim form in terms of the Preferential Procurement Regulations 2022.		
(3)	Bidders are required to complete, sign, and submit Protection of Personal Information Act (POPIA) consent form.		

5.3 Stage 3 - Functionality Assessment

- 1) Proposals that meet the Responsiveness Assessment will be adjudicated further on Functionality.
- 2) The Bidder must meet a minimum of 60 points in order to be considered for the next stage of evaluation. See Table A1 and A2 below:
 - a) **Table A1:** Functionality Criteria Score
 - b) **Table A2:** Indicators for the Scoring of Functionality Criteria
- 3) Bids that do not meet the minimum threshold score of 60 points following the Functionality Assessment shall not be considered further.

Table A1: FUNCTIONALITY CRITERIA SCORE

Functional Criteria	Sub-criteria		Requirements from Bidders
	Description	Max Points	
1. Proposed methodology for offsite document archiving and Comprehensive Company Profile	Proposed methodology for the offsite document archiving, demonstrating understanding of: i. Work organisation programme ii. Resource plan ii. Methodology for executing the work	20	Bidders should provide all activities for the implementation of the offsite document archiving contract, describing the methodology, critical path milestones, work schedule and resource plan in relation to the scope of works. This must also include contingency planning and management. The key risk factors affecting the contract should be described with possible mitigations actions.
Demonstrate past performance in document archiving and management.		20	Bidders are required to provide four (4) contactable, dated and signed reference letters from previous clients for comparable contracts completed in the last five (5) years.
2. Demonstrate qualifications and competency of key personnel.	Contract Manager	5	The Contract Manager's CV should reflect an academic background of Bachelor's Degree or National Diploma on Records Management, Archiving, Library Information systems, Information Management. Bidders are required to submit a copy of academic qualification.
	Messenger/Driver	5	The Driver's CV should reflect an academic background of a minimum of Grade 10. Bidders are required to provide a copy of a valid Code B driver's licence, a Grade 10 report or letter of completion from the school, and copies of any relevant academic certificates would be advantageous.
	Administrator	5	The Administrator's CV should reflect an academic background of Grade 12. Bidders are required to submit a copy of Grade 12 certificate.

Functional Criteria	Sub-criteria		Requirements from Bidders
	Description	Max Points	
	Warehouse assistant/Document handler	5	The Warehouse Assistant's CV should reflect an academic background of a minimum of Grade 10 or higher. Bidders are required to provide a minimum of Grade 10 report or letter of completion from the school, and copies of any relevant academic certificates would be advantageous.
3. Experience of the key personnel that will be available to manage the contract.	Contract Manager	5	Bidder must supply a comprehensive CV detailing five (5) year relevant experience on records management or archiving, with contactable references.
	Messenger/Driver	5	Bidder must supply a comprehensive CV detailing three (3) year relevant experience in driving with three (3) contactable references.
	Administrator	5	Bidder must supply a comprehensive CV detailing three (3) year relevant experience as an administrator - with contactable references.
	Warehouse assistant/Document handler	5	Bidder must supply a comprehensive CV detailing three (3) year relevant experience as a warehouse assistant - with contactable references.
4. Locally Based Service Provider		20	Bidders(s) are required to submit proof of office space, that is, a valid and signed lease agreement, title deed or municipal statement(s), which will be verified accordingly. The municipal statement must not be older than three (3) months from date of submission. Please note: CSD, CIPC registration documents, letters from third parties Letterheads, Search engines, statements etc. will not be considered as proof of office establishment.

Minimum combined weighted point threshold must be 60 points for further consideration of the tender. If the combined weighed score is less than 60 points then the tender is disqualified from further evaluation.

Table A2: INDICATORS FOR THE SCORING OF FUNCTIONALITY CRITERIA

<u>Functionality criteria</u>	<u>Sub criteria</u>	<u>Evaluation Indicators</u>				
		<u>No response</u> <u>(0)</u>	<u>Poor</u> <u>(25)</u>	<u>Satisfactory</u> <u>(50)</u>	<u>Good</u> <u>(75)</u>	<u>Very Good</u> <u>(100)</u>
1. Proposed methodology for offsite document archiving.	Proposed methodology for the offsite document archiving, demonstrating understanding of: i. Work organisation programme ii. Resource plan iii. Methodology for executing the work	Failed to provide information	The proposed methodology, work schedule and resource plan do not correlate with the required scope of works. There is lack of information.	The proposed methodology, work schedule and resource plan correlate with the required scope of works, but there are minor inconsistencies between contract deliverables and proposed methodology, work schedule and resource plan.	The work schedule and resource plan are consistent with the proposed methodology and with the required scope of works.	Besides meeting the “good” rating, the bidder has provided a detailed and concise methodology. The bidder has outlined in the methodology how timesaving can be implemented, by optimising the use of resources or/and by any alternative provision.
2. Demonstrate past performance in document archiving and management.		Failed to provide information.	Submission of one (1) contactable, dated and signed reference letter from previous clients for comparable	Submission of two (2) contactable, dated and signed reference letter from previous clients for comparable contracts completed in the last five (5) years.	Submission of three (3) contactable, dated and signed reference letters from previous clients for comparable contracts completed in the last five (5) years.	Submission of four (4) contactable, dated and signed reference letters from previous clients for comparable contracts completed in the last five (5) years.

<u>Functionality criteria</u>	<u>Sub criteria</u>	<u>Evaluation Indicators</u>				
		<u>No response</u> <u>(0)</u>	<u>Poor</u> <u>(25)</u>	<u>Satisfactory</u> <u>(50)</u>	<u>Good</u> <u>(75)</u>	<u>Very Good</u> <u>(100)</u>
			contracts completed in the last five (5) years.			
3. Qualifications and experience of key personnel.	Contract Manager	Qualifications				
		Failed to provide the required information	Demonstrated irrelevant qualifications.	Demonstrated relevant but incomplete minimum qualifications.	Provided a CV demonstrating relevant qualification without copies of academic qualifications.	Provided a Diploma, Degree and/or Honours in Archiving and Records Management, Library Information Systems, Information Management,
		Experience				
		Failed to provide information	Demonstrated irrelevant experience.	Demonstrated one (1) year experience.	Demonstrated three (3) year experience, including leading similar contracts in Archiving and/or Records Management.	Demonstrated five (5) years and more experience in Archiving and/or Records Management with contactable references. Including leading similar contracts.
		Qualifications				

<u>Functionality criteria</u>	<u>Sub criteria</u>	<u>Evaluation Indicators</u>				
		<u>No response</u> <u>(0)</u>	<u>Poor</u> <u>(25)</u>	<u>Satisfactory</u> <u>(50)</u>	<u>Good</u> <u>(75)</u>	<u>Very Good</u> <u>(100)</u>
	Messenger/Driver	Failed to provide required information.	Irrelevant (below Grade 10) minimum academic qualifications submitted.	Submitted code one (1) motorcycle licence.	Submitted a CV reflecting possession of Code B driver's licence with no copies (evidence).	Submission of a minimum of Code B driver's licence.
		Experience				
		Failed to provide information.	Submission of CV demonstrating less than 1 year experience in driving.	Submission of CV demonstrating one (1) year experience.	Submission of CV demonstrating two (2) years' experience.	Submission of CV demonstrating three (3) years of experience.
	Administrator	Qualifications				
		Failed to provide information.	Demonstrated irrelevant qualifications.	Demonstrated grade eight (8) qualification.	Demonstrated grade ten (10) qualifications.	Demonstrated grade twelve (12) qualifications. with contactable references.
		Experience				
		Failed to provide	Demonstrated irrelevant experience	Demonstrated two (1) year experience in office administration.	Demonstrated two (2) years' experience, in office	Demonstrated relevant three (3) years' experience in Office

<u>Functionality criteria</u>	<u>Sub criteria</u>	<u>Evaluation Indicators</u>				
		<u>No response</u> <u>(0)</u>	<u>Poor</u> <u>(25)</u>	<u>Satisfactory</u> <u>(50)</u>	<u>Good</u> <u>(75)</u>	<u>Very Good</u> <u>(100)</u>
		required information.			administration, with contactable references.	Administration Archiving and Records Management, with contactable references.
	Warehouse assistant/Document handler	Qualifications				
		Failed to provide information.	Demonstrated irrelevant qualifications.	Demonstrated grade eight (6) qualification.	Demonstrated grade eight (8) qualifications.	Demonstrated grade ten (10) qualifications.
		Experience				
		Failed to provide information.	Demonstrated irrelevant experience	Demonstrated one (1) year experience in as a Warehouse Assistant.	Demonstrated two (2) years' experience as a Warehouse Assistant.	Demonstrated three (3) years' experience as a Warehouse Assistant.
4. Locally Based Service Provider		Failed to provide information	Situated outside of the Eastern Cape Province	Situated within the Eastern Cape Province	Situated within the Sarah Baartman District Municipality	Situated in the Nelson Mandela Bay Metropolitan Municipal Area.

5.4 Stage 4 - Quantitative Assessment

Bids that pass the functionality assessment Stage will be further evaluated on Price and Specific Goals. Bids will be evaluated according to the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022. 80/20 preferential point system will be used to evaluate Price and Specific Goals. Points for Specific Goals is provided in SBD 6.1.

Table 5: Preferential Scoring System

Area of Adjudication	Maximum Points
Tendered Price (S_P)	80
Specific Goals (S_E)	20
Total Points (S)	100

80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

$$P_s = 80 \left[1 - \frac{P_t - P_{\min}}{P_{\min}} \right]$$

Where:

- P_s = Points scored for comparative price of bid under consideration
- P_t = Comparative price of bid under consideration
- $P_{\min}$ = Comparative price of lowest acceptable bid

Table 8: Specific goals for the tender and points claimed are indicated per the table below.
(Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE Status Level of Contributor 1	20	
B-BBEE Status Level of Contributor 2	18	
B-BBEE Status Level of Contributor 3	14	
B-BBEE Status Level of Contributor 4	12	

B-BBEE Status Level of Contributor 5	8	
B-BBEE Status Level of Contributor 6	6	
B-BBEE Status Level of Contributor 7	4	
B-BBEE Status Level of Contributor 8	2	
Non-compliant contributor	0	

5.5 Stage 5 - Qualitative Assessment

- (a) Qualitative Assessment will be conducted on the three (3) highest scoring bidders to determine the acceptable lowest tender price and to ascertain other possible commercial risks pertaining to the bidder's capacity, past performance and other risks.
- (b) The prices will be scrutinized to check for arithmetic errors to communicate with the bidders to acknowledge and decide if their bottom-line price still stands.
- (c) Tender offers will be compared against the cost estimate as well as the market average to confirm if the tender offers are market-related with no risks around the pricing.
- (d) The bidders will be assessed on their procurement integrity to establish whether the bidder or any of its directors been convicted of a corrupt or fraudulent act in competing for or executing any contract, whether the bidder or any of its directors is currently government employees and whether there is conflict of interests and/or collusion.
- (e) The bidders will also be checked if they do not appear on the National Treasury's Database of Restricted Suppliers and the Register for Tender Defaulters.
- (f) Assessment of all the risks associated with contract execution and completion of the contract.

5.6 Final Outcomes of the Procurement Process

- (a) Once the bid evaluation is complete, a recommendation for award of the successful bidder will be made to the delegated bid adjudication committee for approval of award.
- (b) Unsuccessful bidders will be advised of the outcome of their bids in the procurement process.

6 DISQUALIFICATION

Respondents will be disqualified immediately during the tendering stage or during the tender evaluation and adjudication stage or after the contract has been awarded if they are found to have conducted or committed any of the following:

- a) The bidder has failed to meet the tender conditions and/or requirements and deemed non-responsive;

- b) There has been an effort by the bidder, representatives of the bidder or acquaintances of the bidder to influence the process of submissions which may be interpreted as a corrupt or fraudulent act or improper conduct;
- c) The bidder has communicated with other members of CDC Members, or CDC Agent about the contract other than the specified person;
- d) The bidder has misrepresented the information submitted;
- e) There is an evidence of Fraud, fronting, etc.;
- f) The bid document is faxed or emailed or not on original document;
- g) The bid document has been filled in pencil and /or have correcting fluid markings or not duly signed where changes are made;
- h) Bidder appears on the National Treasury register of restricted suppliers or National Treasury list of defaulters.

7 PENALTIES

- a) The client shall without prejudice to his/her other remedies under the contract or in law, be entitled to levy a penalty for failure by service provider to provide the service in accordance with the performance specification at the rate stated in (b) below;
- b) Penalty rate will be 5% of the invoice amount, in case of the breach of the Service Level Agreement (SLA) requirements.

8 COPYRIGHT

Copyright of this Document is vested in the CDC. It cannot be copied, in whole or in part, in any form or in any format without the prior written consent of the CDC.

9 FORMAT OF BID SUBMISSIONS

For ease of reference and uniformity of the submissions, the bidders are required to package their Bid Submissions to this RFP as follows:

- (a) Cover Page, reflecting the:
 - (i) Title of the RFP.
 - (ii) Bid Number; and
 - (iii) Name of the Bidder.
- (b) SBD 1 Form – Invitation to Bid.
- (c) Table of Contents.
- (d) The Proposal; and
- (e) Annexures, i.e., the Returnable Documents as indicated in **Section 11** of this document and any other supporting documents.

- (f) Bidders were requested to submit a tightly or securely packed bid document to avoid loose papers, with index and dividers. Bidders may use binders/ arch liver files and/or heavy-duty staplers to bind their bid document. Submission with loose papers shall rejected.

10 CONFIDENTIALITY AND MEDIA PROTOCOL

Any information relating to the submissions, through the process or otherwise shall be treated in strict confidence. The CDC reserves the right to announce the names of Respondents to the media.

In submitting a response, a Respondent agrees that it shall not be entitled to any information disclosed by another applicant to the CDC, which the CDC has determined to be of a confidential nature. The content and details of the evaluation of submissions will remain confidential to the CDC.

11 ANNEXURES

ANNEXURE A: SBD 4 BIDDERS DISCLOSURE FORM

**ANNEXURE B: SBD 6.1 PREFERENCE POINTS CLAIM FORM IN TERMS OF THE
PREFERENTIAL PROCUREMENT REGULATIONS 2022**

ANNEXURE C: EME AND QSE AFFIDAVIT TEMPLATES

ANNEXURE D: KEY PERSONNEL FORM

ANNEXURE E: KEY PERSONNEL (CV & QUALIFICATIONS)

ANNEXURE F: BIDDERS PREVIOUS WORK EXPERIENCE

ANNEXURE G: POPIA CONSENT FORM

ANNEXURE H: AUTHORITY OF SIGNATURE

ANNEXURE I: PROOF OF OFFICE ESTABLISHMENT OF THE BIDDER

ANNEXURE A

SBD 4 BIDDERS DISCLOSURE FORM

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 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 consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 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.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

² Joint venture or Consortium 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.

- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON ENHANCING COMPLIANCE, TRANSPARENCY AND ACCOUNTABILITY IN SUPPLY CHAIN MANAGEMENT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

ANNEXURE B

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1 GENERAL CONDITIONS

1. The following preference point systems are applicable to invitations to tender:
 - the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
2. **To be completed by the organ of state**
 - a) The applicable preference point system for this tender is the 80/20 preference point system.
3. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
 - (a) Price; and
 - (b) Specific Goals.

4. To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

5. Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
6. The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

13 DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

14 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

80/20

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. 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:

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE Status Level of Contributor 1	20	
B-BBEE Status Level of Contributor 2	18	
B-BBEE Status Level of Contributor 3	14	
B-BBEE Status Level of Contributor 4	12	
B-BBEE Status Level of Contributor 5	8	
B-BBEE Status Level of Contributor 6	6	
B-BBEE Status Level of Contributor 7	4	
B-BBEE Status Level of Contributor 8	2	
Non-compliant contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2. Name of company/firm.....

4.3. Company registration number:

4.4. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.5. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	

ANNEXURE C EME AND QSE AFFIDAVIT TEMPLATES

SWORN AFFIDAVIT – B-BBEE EXEMPTED MICRO ENTERPRISE - GENERAL

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a Member / Director / Owner (**Select one**) of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Vat Number (If applicable)	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of “Black People”	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 “Black People” is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;”

Definition of “Black Designated Groups”	“Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and underdeveloped areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;”
--	--

3. I hereby declare under Oath that:

The Enterprise is _____ % Black Owned using the flow-through principle as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9.

(1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,

- ✓ The Enterprise is _____ % Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ The Enterprise is _____ % Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ Black Designated Group Owned % Breakdown as per the definition stated above:
 - ✓ Black Youth % = _____ %
 - ✓ Black Disabled % = _____ %
 - ✓ Black Unemployed % = _____ %
 - ✓ Black People living in Rural areas % = _____ %
 - ✓ Black Military Veterans % = _____ %

- ✓ Based on the Audited Financial Statements/Financial Statements and other information available on the latest financial year-end of _____ (DD/MM/YYYY), the annual Total Revenue was R10,000,000.00 (Ten Million Rands) or less
- ✓ Please Confirm on the below table the B-BBEE Level Contributor, **by ticking the applicable box.**

100% Black Owned	Level One (135% B-BBEE procurement recognition level)	
At least 51% Black Owned	Level Two (125% B-BBEE procurement recognition level)	
Less than 51% Black Owned	Level Four (100% B-BBEE procurement recognition level)	

4. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the Owners of the Enterprise which I represent in this matter.

5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: _____

Date : _____

Commissioner of Oaths
Signature & stamp Date:

SWORN AFFIDAVIT – B-BBEE QUALIFYING SMALL ENTERPRISE - GENERAL

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a Member / Director / Owner (**Select one**) of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Vat Number (If applicable)	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of “Black People”	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 “Black People” is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;”
Definition of “Black Designated Groups”	“Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and underdeveloped areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;”

3. I hereby declare under Oath that:

- ✓ The Enterprise is _____% Black Owned using the flow-through principle as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9.

(1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,

- ✓ The Enterprise is _____% Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ The Enterprise is _____% Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ Black Designated Group Owned % Breakdown as per the definition stated above:

- ✓ Black Youth % = _____%
- ✓ Black Disabled % = _____%
- ✓ Black Unemployed % = _____%
- ✓ Black People living in Rural areas % = _____%
- ✓ Black Military Veterans % = _____%

- ✓ Based on the Audited Financial Statements/ Financial Statements and other information available on the latest financial year-end of _____(DD/MM/YYYY), the annual Total Revenue was between R 10,000,000.00 (Ten Million Rands) and R50,000,000.00 (Fifty Million Rands),

- ✓ Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box.**

100% Black Owned	Level One (135% B-BBEE procurement recognition level)	
At Least 51% black owned	Level Two (125% B-BBEE procurement recognition level)	

4. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.
5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: _____

Date: _____

Commissioner of
Oaths Signature &
stamp Date:

ANNEXURE D

KEY PERSONNEL FORM

Proposed Key Personnel for the Project

DISCIPLINE	FULL NAME AS PER THE ID CARD	CONSENT SIGNATURE OF NOMINATED KEY PERSONNEL
Contract Manager		
Administrator		
Messenger/Driver		
Document handler(s) / Warehouse assistants		

Name:

Signature:

(Nominated representative)

Date.....

Organisation:

NOTE: CVs must be attached.

ANNEXURE E: KEY PERSONNEL (CV & QUALIFICATIONS)

ANNEXURE F: BIDDERS PREVIOUS WORK EXPERIENCE

ANNEXURE G

PROTECTION OF PERSONAL INFORMATION: CONSENT FORM

The introduction of The Protection of Personal Information Act (POPIA) ensures the regulation of personal information through its entire life cycle of collection, transfer, storing and deletion.

As part of its business activities, the Coega Development Corporation (CDC) obtains and requires access to personal data from a wide range of internal and external parties, including without limitation bidders who respond to requests for proposals that are published by the CDC from time to time. The CDC confirms that it shall process the information disclosed by Bidders for the purpose of evaluating and subsequently awarding/appointing a successful Bidder.

In order to comply with procurement principles, set out in Section 217 of the Constitution and national procurement legislative prescripts, the names of all entities that submitted a bid, the tendered price thereof and the subsequent award will be made public.

The CDC hereby states that it does not and will never modify, amend, or alter any personal information submitted to it by a Bidder. Unless directed to do so by an order of court, the CDC does not disclose or permit the disclosure of any personal information to any Third Party without the prior written consent of the owner of the information.

Similarly, Bidders will from time-to-time access and will be seized with information of a personal nature pertaining to the CDC. Some of the information may, because of legislative compliances be available in the public domain, whilst some is uniquely provided to bidders in pursuit of procurement or other business-related activities. In this regard, the CDC requires that Bidders which receive or have access to its personal information process any such information in a manner compliant with the requirements of the POPIA.

AGREEMENT

1. The CDC and the Bidder (the Parties) agree and undertake that upon obtaining and having access to personal information relating to either of them, they shall always ensure that:
 - (a) They process the information only for the express purpose for which it was obtained.
 - (b) Information is provided only to designated and authorized personnel who require the personal information to carry out the Parties' respective obligations in terms of the Procurement processes.
 - (c) They will introduce, and implement all reasonable measures to ensure the protection of all personal information from unauthorized access and/or use.
 - (d) They have taken appropriate measures to safeguard the security, integrity, and authenticity of all personal information in its possession or under its control.
 - (e) The Parties agree that if personal information will be processed for any other purpose other than the one for which the accessing of the information was intended, explicit written consent will be obtained prior to the execution of such reason.
 - (f) The Parties shall carry out regular assessments to identify all reasonably foreseeable internal and external risks to the interception of personal information in its possession or under its control and shall implement and maintain appropriate controls in mitigation of such risks.
2. The Parties agree that they will promptly return or destroy any personal data in their possession or control which belongs to the other Party once it no longer serves the purpose for which it was collected, subject to any legal retention requirements. The information will be destroyed in such a manner that it cannot be reconstructed to its original form, linking it to any individual or organisation.
3. Bidder's Obligations:
 - a) The Bidder is required to notify the Information Officer of CDC, in writing as soon as possible after it becomes aware of or suspects any loss, unauthorised access or unlawful use of any of the CDC's personal information.
 - b) The Bidder shall, at its own cost, promptly and without delay take all necessary steps to mitigate the extent of the loss or compromise of personal data.
 - c) The Bidder shall be required to provide the CDC with details of the persons affected by the compromise and the nature and extent of the compromise, including details of the identity (if known) of the unauthorized person who may have accessed or acquired the personal data.
 - d) The Bidder undertakes to co-operate with any investigation relating to security breach which is carried out by or on behalf of CDC.

On behalf of the Bidder:

.....
Signature

.....
Date

.....
Position

.....
Name of the Bidder

On behalf of the Client:

.....
Signature

.....
Date

.....
Position

.....
Name of Client Representative

ANNEXURE H: AUTHORITY OF SIGNATURE

ANNEXURE I: PROOF OF OFFICE ESTABLISHMENT OF THE BIDDER

END OF RFP DOCUMENT