

REQUEST FOR QUOTATION (RFQ)

APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF OFF-SITE RECORDS MANAGEMENT STORAGE SERVICES FOR A PERIOD OF THREE (3) YEARS.

RFQ No.	RFQ202627/48
RFQ ISSUE DATE	17 SEPTEMBER 2026
COMPULSORY BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF OFF-SITE RECORDS MANAGEMENT STORAGE SERVICES FOR A PERIOD OF THREE (3) YEARS.
CLOSING DATE & TIME	30 SEPTEMBER 2026 @ 12h00 PM.
LOCATION FOR SUBMISSIONS	quotations@tikzn.co.za (PLEASE WRITE RFQ NUMBER ON THE EMAIL SUBJECT LINE)

Bidders must submit responses via e-mail at: quotations@tikzn.co.za before or on the stipulated date and time. For any queries or enquiries, please use the above-mentioned email address.

Trade & Investment KwaZulu-Natal requests your quotation on the goods listed above. Please provide us with all the information as requested and return your quotation on or before the date and time stipulated above. Late and incomplete submissions will invalidate the quotation submitted.

Supplier Name: _____

Postal Address: _____

MAAA NO. (CSD No.): _____

Telephone No.: _____

Fax No.: _____

Email Address: _____

Cell No.: _____

Signature of Bidder: _____

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DIRECTORS: Mr M B Myeni (Chairperson), Prof A T Nzama (Deputy Chairperson), Adv B N Buthelezi, Dr J Channing, Ms S Dlungwane, Mr B E Mkhize, Dr S K Mpungose, Dr S Ndlovu, Cllr M N Zulu, Mr R N Ngcamu (CEO), Mr T V Mhlongo (CFO), Mr Z Sibisi (Company Secretary)



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APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF OFF-SITE RECORDS MANAGEMENT STORAGE SERVICES FOR A PERIOD OF THREE (3) YEARS.

1. INTRODUCTION

- 1.1 Trade & Investment KwaZulu-Natal is a South African trade and inward investment promotion agency, established as a Schedule 3C public entity, to promote the province of KwaZulu-Natal as an investment destination and to facilitate trade by assisting local companies to access international markets. In terms of the Public Finance Management Act, Act No.1 of 1999, as amended (PFMA), Trade & Investment KwaZulu-Natal, must fully comply with all the requirements of the PFMA and all other relevant and applicable legislation.
- 1.2 Trade & Investment KwaZulu-Natal is governed by the KwaZulu-Natal Trade and Investment Agency Act, 2010 (Act No. 05 of 2010). In terms of chapter 2 section 4 (1) of the KwaZulu-Natal Trade and Investment Act, the main functions of the entity are to:
- 1.2.1 Identify, develop, market and promote investment opportunities in the province to international and domestic investors.
 - 1.2.2 Develop the export capacity of the province.
 - 1.2.3 Develop the export market of the province.
 - 1.2.4 Foster trade and investment within the province.
 - 1.2.5 Develop a provincial investment and export plan for the development, promotion and marketing of inward investments and exports from the province.
 - 1.2.6 Keep and maintain a database of investment opportunities within the province in such a manner as to benefit all sectors of the economy.

2. BACKGROUND

Trade & Investment KwaZulu-Natal (TIKZN) generates and maintains a significant volume of physical records in the execution of its mandate. The increasing volume of records requires a secure and reliable off-site storage solution to optimise office space, safeguard organisational information and ensure efficient retrieval when required for operational, audit and compliance purposes. The proposed service will provide secure, organised and environmentally controlled storage, tracking, retrieval and authorised disposal of records in accordance with applicable legislation, including the National Archives and Records Service of South Africa Act, 1996 and the Protection of Personal Information Act, 2013.

3. PURPOSE

The purpose of this Request for Quotation (RFQ) is to request suitable qualified service providers to submit their proposals for the provision of off-site storage facility and management of records for Trade & Investment KwaZulu-Natal for a period of three years with an option to renew for two years based on performance.

4. SCOPE OF WORK AND SPECIFICATIONS

- 4.1. Service provider to collect, transfer and record TIKZN records from current external storage facility to the new storage facility.
- 4.2. Provision of a fully functional processing area for the provision of an Off- Site Storage Facility and Management of Records for TIKZN.
- 4.3. Provision of empty boxes (preferably acid free) with Lids (Minimum box side of 430mm x 330mm x 260mm).
- 4.4. Collection of TIKZN records for storage as and when required.
- 4.5. Data entry as required.
- 4.6. Location handling of records as and when required.
- 4.7. Retrieval handling, delivery, collection and return of records.

- 4.8. Retrieval handling, scan to email and return handling.
- 4.9. Destruction handling and provision of destruction certificate as and when required.
- 4.10. Disposal of records to be done with prior approval of TIKZN.
- 4.11. Submission of regular reporting in terms of all files due for storage, retrieval and disposal in terms of the National Archive Act.
- 4.12. Digitization of records.

4.13. EXPECTED DELIVERABLES

- 4.13.1 To provide from the outset clear labelling procedure using TIKZN terminology for each type of record that is needed to be archived.
- 4.13.2 To provide boxes for storage of records and all other stationery items.
- 4.13.3 To collect boxes of records from TIKZN building and deliver to the storage premises within 24 hours of receipt of the request.
- 4.13.4 To undertake/cater for movement of records from the storage facility to TIZN within 24 hours of receipt of the request.
- 4.13.5 To provide for the collection and storage from the outgoing service provider of existing records in excess of ±3000 boxes. The quantity of records changes monthly.
- 4.13.6 To provide for the indexing and cataloguing of records/data to ensure easily access and retrieval of documentation quarterly.
- 4.13.7 To provide on monthly basis update documentation to the Records/Archives Officer on all archived material housed in the offsite storage facility.
- 4.13.8 To provide on a quarterly basis a monitoring management report and advising TIKZN on any aspects that could compromise the integrity of the archiving.

4.14. REQUIREMENTS OF THE STORAGE FACILITY

- 4.14.1 The storage facility must be in such a way that records are protected from perils like fire, direct sunlight, dust, theft, water, pests, extreme temperature & humidity.
- 4.14.2 The storage facility is to be sufficiently ventilated ensuring that the humidity and temperature is per the required standards.
- 4.14.3 As far as possible, the walls, floors and roof should be constructed of non-flammable materials, like brick and cement. The doors, windows should be equipped with burglar proofing. Both windows and doors should be constructed in such a manner that blocks non unauthorized persons may gain access to the records to cause damage to records. Electrical installation should be installed in such a way as to prevent electrical faults from causing fire.
- 4.14.4 Racking and shelving to be constructed from non-flammable materials to provide additional protection to the records.
- 4.14.5 The storage facility should have reliable infrastructure i.e. telephone network/computer network.
- 4.14.6 The storage facility must be fumigated at regular intervals (at least annually) as required by Regulation.

4.15. STORAGE, COLLECTION AND DELIVERY CAPABILITIES

- 4.15.1 The storage premises must be capable of storing various types of documents.
- 4.15.2 The storage premises must have a secure, climate-controlled Data Storage Vault.
- 4.15.3 The vault must be fireproof, dust-free humidity and climate-controlled environment.
- 4.15.4 All vehicles used to transport documents must be temperature controlled and always tracked.
- 4.15.5 All containers, packets and or boxes utilized for storage must be uniquely barcoded.
- 4.15.6 Short training to TIKZN administrative staff on how to pack and label the boxes.

4.16. DISASTER PREVENTION

- 4.16.1 All parts of storage facility must have adequate fire detection system that is connected to a central monitoring panel.
- 4.16.2 The storage facility must have alarm to indicate abnormal conditions and problems to take corrective action and to bring the facility back to normal conditions.
- 4.16.3 The storage facility must have adequate automatic fire suppression systems.
- 4.16.4 The storage facility must have portable fire extinguishers.
- 4.16.5 The staff based at the storage facility must be fully trained in the use of the portable extinguishers.
- 4.16.6 Only Carbon dioxide (CO2) extinguishers should be used.
- 4.16.7 The vault where digital media is stored must have SABS approved door, ceiling, concrete walls and floor.

- 4.17. GENERAL SECURITY
 - 4.17.1 The storage facility must have 24 hours monitored security.
 - 4.17.2 The storage facility must be monitored by CCTV cameras.
 - 4.17.3 The storage facility must have authorized access to the facility.
 - 4.17.4 The storage facility premises must have secured/functional loading and off-loading equipment and must be tested regularly.
 - 4.17.5 All TIKZN records and media that is conveyed on a vehicle for transit purposes to the storage facility must be properly secured and enclosed to ensure that the archival material is protected from the elements of rain, wind, etc and such vehicle should also be fitted with a CO2 fire extinguisher.

- 4.18. POLICY PROCEDURES & PHYSICAL CARE OF DOCUMENTS
 - 4.18.1 The service provider must comply with the National Archives and Records Act.
 - 4.18.2 The employees engaged by the Service Provider must be required to sign a confidentiality agreement.
 - 4.18.3 The service provider must provide ongoing employee education and awareness regarding the protection of records in the care of the company.

- 4.19. CONFIDENTIALITY OF INFORMATION
 - 4.19.1 All documents received and created during the score of this service provider appointment is subjected to the Provincial Archives and Records Services of Kwa-Zulu Natal Act (Act No 43 of 1996 and all other legislation established under the framework of the Republic of South African Constitution, Act 108 of 1996 under which official data, records and documents of TIKZN are created and managed.
 - 4.19.2 All data, records and documents that is received from TIKZN by the service provider for storage purposes is strictly confidential and the information contained therein and shall not be disclosed to any person or body.
 - 4.19.3 No records/documentation may be removed from any storage folder/device or to be destroyed without the explicit permission from TIKZN.

- 4.20. EQUIPMENT AND MACHINERY
 - 4.20.1 The Service Provider must have the ability to meet the requirements to provide offsite document storage (the storage warehouse, the storage equipment, stationery used, fire prevention and detection system, security and vehicles used to transport the records must be detailed in the proposal.
 - 4.20.2 The performance of the service provider will be reviewed and measured monthly and during quarterly meetings.

5. EVALUATION PROCESS

Document Name		Included in the published RFQ document?	To be returned by the bidder	Yes/ No
5.1 PHASE 1: MANDATORY REQUIREMENTS				
1.	Certified Copy of a Valid National Archives and Records Service of South Africa (NARSSA) Compliance Certificate.	No	Yes	
2.	Certified Copy of a Valid Fumigation Certificate	No	Yes	
3.	Proof of Valid Insurance Cover for the Storage Premises and Contents Including Vehicles.	No	Yes	
4.	Certified Copy of a Fire Detection Service Certificate (Excluding Carbon Dioxide Emission for Suppression).	No	Yes	
5.	Proof that Storage Warehouse Complies with Security Arrangement as Required in Terms of Private Security Industry Regulation Authority Act. Bidder Must Provide a Certified Copy of their Security Company's PSIRA Certificate Together with the Agreement Letter.	No	Yes	
6.	Pricing Schedule	Yes	Yes	
5.2 PHASE 2: SCM ADMINISTRATIVE REQUIREMENTS				
7.	Proof of registration on Central Supplier Database (full CSD report)	No	Yes	
8.	Valid Tax Clearance Certificate	No	Yes	
9.	COIDA Valid Letter of Good Standing	No	Yes	
10.	SBD 1 invitation to bid form	Yes	Yes	
11.	SBD 4 Declaration of Interest	Yes	Yes	
12.	SBD 6.1 Preference Points Claim Form	Yes	Yes	
13.	POPIA consent form	Yes	Yes	

NOTE: Failure to meet all the mandatory and SCM administrative requirements will lead to the Bidder being disqualified and not evaluated further.

5.3. PHASE 3: FUNCTIONALITY

5.3.1 Only bidders who meet the minimum qualifying score for Stage 1 (written functionality) will proceed to stage 2 (site inspection). Site inspection is mandatory for bidders who have qualified for stage 2 (site inspection).

5.3.2 Bidders must achieve a minimum of 70% for Stage 1 and a minimum of 70% for Stage 2. Failure to meet either minimum threshold will result in disqualification.

Thresholds:

Stage	Points	Minimum Required
Stage 1 – Written	80	56/80 (70%)
Stage 2 – Site inspection	70	49/70 (70%)
Combined Functionality	150	105/150 (70%)

5.3.3 The service providers will be evaluated on functionality in accordance with the below functionality criteria and values:

GUIDELINES FOR CATEGORY CRITERIA	FUNCTIONALITY (GUIDELINES FOR CRITERIA APPLICATION)		WEIGHT
STAGE 1: WRITTEN FUNCTIONALITY			
BIDDER'S PREVIOUS EXPERIENCE	The bidder to demonstrate comprehensive proven experience on previously completed similar projects in the past 10 years, Provision of Off-Site Storage Facility and Management of Records.	Indicator	30
	Bidder must attach reference letters confirming services rendered to public/ private entity. Reference letters must be on the referee's letter head, dated and signed and they must be for the services rendered in the past ten (10) years.		
	No reference letter attached/irrelevant reference letter attached	0	
	1 to 2 relevant reference letters attached	10	
	3 to 4 relevant reference letters attached	20	
	5 or more relevant reference letters attached	30	
	KEY PERSONNEL (Required expertise)	Bidder must attach detailed CVs of the proposed project team members that will service TIKZN, including the following: (The bidder to clearly stipulates position of each team member according to the below mentioned).	
ACCOUNT MANAGER: Minimum Diploma in Information Science or / Records and Archives Management and registration with South African Society of Archivists (SASA) with One (1) to Four (4) years of experience.		10	
Minimum Diploma in Information Science or / Records and Archives Management and registration with South African Society of Archivists (SASA) with five (5) to nine (9) years of experience.		20	
Minimum Diploma in Information Science or / Records and Archives Management and registration with South African Society of Archivists (SASA) with 10 or more years of experience.		30	
Non-compliance with the above = 0 points			
PROPERTY, PLANT AND EQUIPMENT/ TOOLS OF TRADE.	The bidder must have resources that are required to provide the services, together with all required documentation as supporting documents showing the status of ownership and availability of resources.	Indicator	20
	Attach proof of Logbook or Lease Agreement, tracker certificates and proof of alarm system.		
	Bidder must have 1 x Vehicles fully enclosed with alarm and satellite tracking and crew members of two with a loading capacity of not less than 4100kg	10	
	Bidder must have 2 x Vehicles fully enclosed with alarm and satellite tracking and crew members of two with a loading capacity of not less than 4100kg.	20	
Total points on written functionality (Bidder must achieve 56/80 = 70% to be considered for stage 2)			80
STAGE 2: SITE INSPECTION			
1. Storage facility	The site inspection will verify the bidder's proposed storage facility:	Points	20
	Proof of ownership or lease agreement of the facilities (valid lease agreement)	5	
	Facility location, accessibility and cleanliness of the facility	5	
	Physical security measures (24/7 access control, surveillance, guards etc.)	5	
	Environmental controls (fire detection/suppression, moisture control, ventilation) Compliance with building and safety standards	5	
	The site inspection will verify operational practices for handling and storing records.	Points	

STAGE 2: SITE INSPECTION			
2. Documents Handling and Storage Practice	Proper shelving and storage of records	5	25
	Good condition of boxes and files	5	
	Evidence of proper packing, labelling, and inventory tracking	5	
	Accessibility and organization of records	5	
	Proper procedures for handling sensitive or high-value records	5	
3. Access and Retrieval Systems	Inspectors will assess the effectiveness of access and retrieval processes:	Points	25
	Use of an electronic or manual tracking system to locate records	5	
	Controls to ensure only authorized access to records	5	
	Ability to track movement and the history of records	5	
	Secure and documented return process for retrieved records	5	
	Clearly defined and documented access and retrieval procedures	5	
Total points for site inspection (Bidder must achieve 49/70 = 70% to pass stage 2)			70
TOTAL POINTS ON COMBINED FUNCTIONALITY (Bidders must obtain a minimum passing score of 105/150 points (70%) to proceed to phase 4)			150

5.4. PHASE 4: PRICE AND SPECIFIC GOALS

5.5.1 Pricing Considerations

- A separate quotation with cost breakdown on bidders' letterhead must be submitted.
- Bidders' price quotations must be inclusive of all applicable taxes (including VAT) in RSA rand.
- Bidders' total price weighs 80 points.
- Price must include the entire scope of work and any other logistics or disbursement that assist the service provider in delivering the final product (s) to TIKZN as per the scope of work and within the set timelines.

PRICING SCHEDULE

DESCRIPTION	CURRENT ESTIMATED QUANTITY	AMOUNT
Once off collection and recording of TIKZN records from current external storage facility	Lumpsum	
Monthly storage rental of records	Per Month	
Collection of TIKZN records for storage as and when required	Per Trip	
Data entry as required	Per Box	
Location handling of records as and when required	Per Box	
Retrieval – Handling fee, Delivery, Collection fee of documents, and Return handling fee	Per Box	
Retrieval – Handling fee, Scan to email fee and Return handling fee	Per Box	
Destruction handling and Destruction certificate (as and when required)	Per Box	
Disposal report (as and when required)	Per Box	
Supply and delivery of empty boxes with lids	Per box	
Digitisation of records (as and when required)	Per Page	
TOTAL COST (EXCL. VAT)		
VAT 15%		
TOTAL COST (INCL. VAT)		

5.5.2 Specific Goals

- a) The bidder must submit the SBD 6.1 preference points claim form.
- b) B-BBEE Certificate / Affidavit.
- c) Bidders' specific goals weigh 20 points.

Specific Goals Criteria	Points
Ownership by Historically Disadvantaged Individuals (HDIs):	20
1. Black Owned Enterprises: 51% or more = 05 points Proof of claim: CSD registration report and BBBEE Certificate/Affidavit.	
RDP Goals 2. Promotion of enterprises located in eThekweni Municipality for work to be done or services to be rendered. = 15 points Proof of claim: Copy of a utility bill for property rates and services/ valid lease agreement/ original proof of residence signed by a Ward Councillor.	
Total Points	20

RFQ responses will be evaluated on the 80/20 Price & specific goals. Completed SBD 6.1. Preference Points Claim Form in terms of The Preferential Procurement Regulations 2022 must be completed and submitted to claim specific goals points. Failing to submit will result in your company scoring zero (0) points for specific goals.

NB: Tax matters for the recommended bidder will be verified on Central Supplier Database (CSD) or SARS e-Filing prior to awarding. If the bidders' tax matters are non-compliant in terms of clause 4.2 & 4.3 will be exercised from National Treasury Instruction No. 09 of 2017/2018 (Tax Compliance Status Verification).

6. COMMUNICATION

All enquiries relating to this RFQ should be sent via email: quotations@tikzn.co.za.

7. INSTRUCTION TO SERVICE PROVIDERS

The services required by Trade & Investment KwaZulu-Natal are described in these Terms of Reference and therefore all applicable annexures which are listed as mandatory must be comprehensively covered in your proposal.

8. SERVICE LEVEL AGREEMENT

It is the intention of TIKZN to enter into a formal Service Level agreement (SLA) with the successful service provider. The RFQ and the service provider's proposal will form the basis of the service level agreement to be entered into between the parties.

9. CONDITIONS TO BE OBSERVED WHEN RESPONDING TO RFQ

No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of award/order form is prepared and executed. The quotation remains open for acceptance by Trade & Investment KwaZulu-Natal for a period of 90 days from the closing date of the RFQ Enquiry.

10. COST OF BIDDING

The service provider shall bear all costs and expenses associated with the preparation and submission of its RFQ, and Trade & Investment KwaZulu-Natal shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

END OF RFQ DOCUMENT

Annexed to this document for completion and return with the document:

1. Quotation on a company letterhead.
2. Registration certificate with COID
3. Completed and signed Declaration of Interest (SBD 4).
4. Completed and signed Invitation to bid (SBD1 -Part A & B).
5. Completed and signed POPIA consent form.
6. Completed and signed preference points claim form (SBD6.1).
7. Copy of CSD Report or MAAA Number (National Treasury).
8. Information requested as per the mandatory requirements.

Consent to Process Personal Information
in terms of
Protection of Personal Information Act No. 4 of 2013

(MANDATORY FOR ALL INTERACTIONS WITH TIKZN)

I, the undersigned _____
(Full Name and Surname)
(Hereinafter be referred to as the "Data Subject")

ID number _____
(If not available, date of birth & passport number)

Address _____

hereby give my consent to Trade & Investment KwaZulu-Natal (TIKZN), who is a Responsible Party¹ to process² my Personal Information for the following purposes:

	Providing me with advice, products and services that suit my needs as requested
YES	To conduct Central Supplier Database ("CSD") reference searches
YES	To process my applications and requests
	To notify me of new services, opportunities that may be of interest to me
YES	To confirm, verify and update my details
YES	To comply with any legal and regulatory requirements
	To conduct qualification verifications, credit checks, reference checks, criminal record checks, psychometric assessment and/or reporting to regulating authorities.
	Add further details of purposes:

I furthermore authorise TIKZN to verify my identity and any information I have provided. This personal information will not be shared with any third parties without my specific approval and will not be sold, distributed or leased to third parties unless my permission has been granted or required by law to do so.

I furthermore unconditionally indemnify TIKZN against any liability which results or may result from furnishing information in this regard.

TIKZN will not be liable for any damages of any kind arising from my use of their services, including but not limited to direct, indirect, incidental, punitive and/or consequential damages.

I further understand that should I not give my consent to the processing of my personal information for the purpose specified above, then TIKZN will not proceed with said purpose.

Signed at _____ on this ____/____/_____
(Place) (Day) (Month)(Year) (Signature of Employee)

¹ "responsible party" means a public or private body or any other person which, alone or in conjunction with others, determines the purpose of and means for processing personal information;

² "processing" means any operation or activity or any set of operations, whether or not by automatic means, concerning personal information, including:
(a) the collection, receipt, recording, organisation, collation, storage, updating or modification, retrieval, alteration, consultation or use;
(b) dissemination by means of transmission, distribution or making available in any other form; or
(c) merging, linking, as well as restriction, degradation, erasure or destruction of information;

BIDDER'S DISCLOSURE

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

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.

with any person who is employed by the procuring institution? **YES/NO**

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

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.

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.

- 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 PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	
Signature	Date
.....	
Position	Name of bidder

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)									
BID NUMBER:		CLOSING DATE:			CLOSING TIME:				
DESCRIPTION									
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)									
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO					TECHNICAL ENQUIRIES MAY BE DIRECTED TO:				
CONTACT PERSON					CONTACT PERSON				
TELEPHONE NUMBER					TELEPHONE NUMBER				
FACSIMILE NUMBER					FACSIMILE NUMBER				
E-MAIL ADDRESS					E-MAIL ADDRESS				
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	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE		TICK APPLICABLE BOX]			B-BBEE STATUS LEVEL SWORN AFFIDAVIT			[TICK APPLICABLE BOX]	
		☐ Yes ☐ No						☐ Yes ☐ No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]									
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		☐ Yes ☐ No [IF YES ENCLOSE PROOF]			ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS 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:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. 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:

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

1.1 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
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

(Delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 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.

1.4 **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

- 1.5 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.
- 1.6 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.

2. 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).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

Where

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

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}}\right) \quad \text{or} \quad Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}}\right)$$

Where

- Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest 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:
- 4.2. 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 either the 90/10 or 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.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
	20	20
Black Ownership: 51% or more black owned enterprises. The bidder with less than 51% black ownership will score 0 points Proof of Claim: CSD Report/BBBEE certificate/Affidavit.	05	
Promotion of enterprises located in eThekweni Municipality Proof of claim: Copy of a utility bill for property rates and services/ valid lease agreement/ proof of residence signed by a Ward Councilor.	15	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. 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]

4.6. 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:

- 4.7.
- 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 because 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 because 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:	
	
	
	