



REQUEST FOR QUOTATION (RFQ)

RFQ NUMBER	SS/185/03/2020
DATE ISSUED	02 March 2020
PROJECT NAME	Document Management Solution for a period of three (03) years
CLOSING DATE AND TIME	11 March 2020 @16h30
NAME OF PROPOSER/TENDERER	
CSD SUPPLIER NUMBER (MA NUMBER)	
TELEPHONE NUMBER	
FAX NUMBER	
EMAIL ADDRESS	
PHYSICAL ADDRESS	
B-BBEE STATUS LEVEL OF CONTRIBUTION	
FULL NAME OF BIDDER OR HIS OR HER REPRESENTATIVE	
IDENTITY NUMBER	
POSITION OCCUPIED IN THE COMPANY (DIRECTOR, TRUSTEE, SHAREHOLDER)	
COMPANY REGISTRATION NUMBER	
TAX REFERENCE NUMBER	
VAT REGISTRATION NUMBER	
QUOTE PRICE (INCL VAT)	
SIGNATURE	

Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee number / Personal number

1. DECLARATION OF INTEREST (SBD 4)

Any legal person, including persons employed by the state¹, SANSA Board members or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- The bidder is employed by the state;
- SANSA Board member; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid

¹“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament

Are you or any person connected with the bidder presently employed by the state? If so, furnish the following particulars: Name of person / director / trustee / shareholder/ member:..... Name of state institution at which you or the person connected to the bidder is employed..... Position occupied in the state institution:..... Any other particulars:.....	YES / NO
If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? If yes, did you attach proof of such authority to the bid document? (Note: Failure to submit proof of such authority, where applicable, may result in the qualification of the bid If no, furnish reasons for non-submission of such of:.....	YES / NO YES / NO

.....	
Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? If so, furnish particulars:.....	YES / NO
Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? If so, furnish particulars:.....	YES / NO
Are you, or any person connected with the bidder aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? If so, furnish particulars:.....	YES / NO
Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? If so, furnish particulars:.....	YES / NO

2. Declaration of Bidder's past supply chain management practices (SBD 8)

2.1 This Standard Bidding Document must form part of all bids invited.

2.2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system

2.3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-

2.3.1 Abused the institution's supply chain management system

2.3.2 Committed fraud or any other improper conduct in relation to such system; or

2.3.3 Failed to perform on any previous contract.

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

Item	Question	Yes	No
2. 4.1	Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.4.1.1	If so, furnish particulars:		

2.4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.4.2.1	If so, furnish particulars:		
2.4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.4.3.1	If so, furnish particulars:		
2.4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.4.4.1	If so, furnish particulars:		

3. Certificate of Independent Bid Determination (SBD 9)

- 3.1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 3.2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3.3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
- a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 3.4 This SBD serves as a certificate of declaration that would be used by institutions to ensure

that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

3.5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

Certificate of Independent Bid Determination

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:
 (Name of Bidder)

- A. I have read and I understand the contents of this Certificate;
- B. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
- C. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
- D. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
- E. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) Has been requested to submit a bid in response to this bid invitation;
 - (b) Could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) Provides the same goods and services as the bidder and/or is in the same line of

business as the bidder

- F. 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 consortium³ will not be construed as collusive bidding.
- G. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (i) prices;
 - (ii) geographical area where product or service will be rendered (market allocation)
 - (iii) methods, factors or formulas used to calculate prices;
 - (iv) the intention or decision to submit or not to submit, a bid;
 - (v) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (vi) bidding with the intention not to win the bid.
- H. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
- I. 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 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.

- J. 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.

4. REQUEST FOR QUOTATION FOR DOCUMENT MANAGEMENT SOLUTION FOR A PERIOD OF THREE YEARS

The South African National Space Agency (SANSA) requires the services of a service provider to provide a Document Management Solution for a period of three years.

4.1 BACKGROUND TO SANSA

The South African National Space Agency (SANSA) has a mandate, as outlined in the South African National Space Agency Act, 2008 (Act No 36 of 2008), to coordinate and integrate national space science and technology programmes and conduct long-term planning and implementation of space-related activities in South Africa, for the benefit of the citizens of South Africa.

4.2 SCOPE OF WORK

The SANSA offices located at the Hermanus facility in the Western Cape requires a service provider to supply Document Management Solution for the following purpose:

- Storing historical hard copy documents from our previous operations and library records. These documents could be different sizes and have different print (e.g. hand-written). The scanning of these documents into this Document Management Solution will be done separately.
- Storing new documents:
 - day-to-day upload of hard copies
 - day-to-day upload of electronic documents

4.2.1. Required system functionalities

- a) Storage of documentation
 - Store electronic and scanned documentation in an accessible and secure repository.
 - Users should be able to organise documents easily within this repository.
 - The solution should be able to store the data based on meta data principles
- b) Retrieval of documentation
 - Provide user-friendly searching and sharing functionality within the repository.
 - OCR searching capabilities
- c) Workflow and Routing
 - Enable users to route documents within automated workflows to individual or multiple groups.
 - Rerouting of incoming documentation according to rules and operational procedures and workflows
 - This functionality should be based on pre-determined rules and workflows.
 - The workflow and rules should be easily customisable.
- d) The electronic signing of documents
 - Users should be able to sign documents electronically (using a digital certificate) and distribute signed documents

- Signature compliance in terms of the POPI and the ECT Act
- e) Compatibility and Integration
- Integration with MS Office, Office 365, Outlook (MS Add-in)
 - Integration with HTTP RESTful APIs
 - Users should be able to send mails from Outlook directly to the solution
- f) Electronic Forms
- Capability to create form templates
 - Automatic data collection and population of templates
 - Approval workflow of forms
- g) Security
- Administration of user access control and rights
 - Allow certain features per user
 - Microsoft Active Directory integration for user management
 - Secure your documents from internal and external threats
 - Permissions should be applied on folder, document and index levels
- h) PDF Manipulation
- The splitting, merging, rotating, watermarking or signing PDF documents within the software
- i) Reporting
- Report on any documents, meta data and usage within the data management solution
 - User to be able to design and save reports depending on operational requirements
 - Automated report scheduling
- j) Version control
- Record change history to avoid duplication
 - Full access to previous versions of a document
- k) Retention of documents
- Application of retention policies depending on various documents and groups

4.2.2. Hosting

- Service provider to provide a cloud-based solution
- Cloud-based solution must provide for online support, backups and replication and ensure software is kept up to date for the duration of the contract.
- Service to be provided through HTTPS secure sites (SHA256 signature certificate)
- Backups to be encrypted
- Number of users: maximum 100 (would prefer a solution where the actual usage is billed on monthly bases)

4.2.3. Training

- The service provider to provide training to the ICT department onsite in Hermanus Western Cape.
- Manuals to be provided
- The training should be based on fully implemented solution and the trainees should have the opportunity to use SANSA documents during practical training.
- The training should include but not limited to:
 - Setup and administration of access control
 - Creation of workflows and rules
 - Design reports and templates
 - Setting up e-signatures
 - Creation of forms

4.2.4. Support and software maintenance

- Maintenance and support to be provided for the duration of the contract period (three years)
- Service Level Agreement will be signed after the award stipulating turnaround times and other requirements.

5. EVALUATION CRITERIA

SANSA promotes the concept of “best value” in the award of contracts, as opposed to merely looking for the cheapest price, which does not necessarily provide the best value. Best value incorporates the expertise, experience and technical proposal of the organisation and individuals who will be providing the service and the organisational capacity supporting the project team.

SANSA is committed to achieving Government’s transformation objectives in terms of the Preferential Procurement Policy Framework Act.

The value of this bid is estimated not to exceed R500 000 (all applicable taxes included) and therefore the **80/20** system shall be applicable.

Please Note: the above amount (R500 000) is not the Budget Amount for this Project but is the Treasury threshold for request for quotation (RFQ).

The procedure for the evaluation of responsive tenders is **functionality (quality), price, and preference** method. The evaluation of the bids will be conducted in the following three stages:

- Firstly, the bidder will have to comply with eligibility criteria as per Table 2
- Thereafter assessment of quality will be done in terms of the evaluation criteria (Table 1) and the minimum threshold of **80 points** explained below. A bid will be disqualified if it fails to meet the minimum threshold for functionality as per the bid invitation
- Only qualifying bids will have evaluated in terms of the 80/20 preference points systems, where the 80 points will be used for price and the 20 points will be awarded to a bidder for attaining the B-BBEE status level of contributor in accordance with the Table below

5.1. Preference

(ORIGINAL/CERTIFIED B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE)

Calculation of points for B-BBEE status level contributor

Points will be awarded to a bidder for attaining the B-BBEE status level of contributor in accordance with the Table1 below

Table1: B-BBEE level and points

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

5.2. Eligibility Criteria

To be eligible for the price and preferencing evaluation, the bidder must submit the following as per table 2 below.

If there is “**No**” on the Table 2 below, the bidder who didn’t submit the required document (s) with their bid will be requested in writing to submit them within three (3) working days for inclusion in the Bid Evaluation Committee item, if a bidder fails to submit on the 3rd working day, the relevant bid will be rejected.

Table 2: Eligibility Criteria

Criteria	Attached (Yes/No)	Comments
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CSD Registration Summary Report with a compliant tax status		

Quality/Functionality:

Scores will be tabulated to 100 points. Respondents must score 80 points and over to be assessed on their financial offer and preference score.

Bidders will be evaluated on:

- Adherence to the scope of work and specification
- Bidder's experience
- Contactable references

The allocation of points for the evaluation of quality/functionality is set out in Table 1 below:

Table 1:

Criteria	Maximum Points
Adherence to specification	60
Bidder's experience	20
Contactable references	20
Total evaluation points for quality	100

5.2.1. Evaluation criteria 1: Adherence to the specification and quality of offering

- Bidder must submit a portfolio detailing the functionality and features of the solution.
- Bidder must submit a presentation video demonstrating an overview of the solution functionality. Video to be sent via a link.

Score	Criteria
0	The bidder did not submit both the portfolio and presentation video
20	The portfolio and presentation is only detailing some of the functionalities.
40	The portfolio meets all requirements as per scope of work.
60	The portfolio and presentation video meets all requirements as per scope of work .

5.2.2. Evaluation criteria 2: Supplier's experience in supplying Document Management solution

Description: The bidder should submit a company profile indicating their years' experience in providing the proposed Document Management Solution.

Criteria	Maximum Points
0	The supplier has no previous experience supplying of the proposed Document Management solution
10	The supplier has indicated less than (04) years of relevant experience in provisioning of the proposed Document Management Solution and other services as per scope of work
20	The supplier has four (04) or more years of relevant experience in provisioning of the proposed Document Management Solution and other services as per scope of work.

Experience: Please attach company profile and indicate number of years' experience in providing and supporting the proposed Document Management Solution

Reference Name	Please Circle	
I have attached my company profile	Yes	No
Number of years' experience provisioning of the proposed Document Management Solution	< 4years	>= 4 years

5.2.3. Evaluation criteria 3: References

The supplier must provide at least **three (03) letters** from contactable references to whom solutions of a similar nature (Document Management Solution) have been supplied during the last 03 years

Criteria	Maximum Points
0	No customer references have been provided
10	The supplier submitted three (03) letters from contactable references
20	The supplier submitted more than three (03) letters from contactable references

6. PRICING SCHEDULE

Pricing Instructions

1. The Bidder must price all items;
2. Rates are to include all costs with no unspecified cost to allow for a fair evaluation.
3. Payment will be made based on services rendered
4. Payment will only be made on the basis of invoices provided.
5. Offer to be valid for 30 days from the bid closing date.

DESCRIPTION	Year 1 (incl VAT)	Year 2 (incl VAT)	Year 3 (incl VAT)
Document Management Solution (100 users) per year			
Support and maintenance			
Onsite Training- to include all costs			
Any other cost- please specify			
TOTAL CONTRACT AMOUNT (INCLUDING VAT)			
GRAND TOTAL INCLUDING VAT			

A detailed quotation to be sent with the proposal.

Please note that all expenses relating to providing service in Hermanus Western Cape Should be included.

7. SPECIAL CONDITIONS

- a) Quotations to be returned to: Zmatshebele@sansa.org.za / 028 312 1196
- b) Contract will not be awarded unless supplier is registered on the Central Supplier Database. A supplier registration summary with a compliance tax status must be submitted with the proposal. Potential suppliers should contact SANSA should they require assistance in registering on the CSD.
- c) **A supplier summary from the CSD** should be submitted indicating verified tax compliance status.
- d) This RFQ is part of the Supplier Development Programme (SDP). The recommended bidder will be required to sign a SDP agreement for shorter payment periods for EMEs.
- e) The offices of SANSA are situated at the following address:
Hospital Road
Hermanus
Western Cape

8. TIMELINES

The successful service provider must be in the position to provide the service immediately after the SLA has been signed the purchase order has been issued by SANSA.

9. SUPPORTING DOCUMENTATION AND MINIMUM CRITERIA

In order to demonstrate their capacity and score points with respect to the criteria, tenderers should provide the following supporting documentation.

- a. Original/Certified B-BBEE status level verification certificate/Sworn affidavit must be submitted in order to qualify for preference points for B-BBEE);
- b. Portfolio and presentation video
- c. Quotation must reflect a cost breakdown, where applicable, prices quoted must be inclusive of VAT
- d. Quotation to be valid for 30 days
- e. All pages of quotation must be signed by the authorised person

- f. SANSA has the right to withdraw any quotation at any time within the validity of the quotation.
- g. **SANSA reserves the right to invite suppliers/companies to present their bid proposals for final decision**

10. DECLARATION

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise:

- i) confirms that neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- ii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iii) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest;
- iv) confirms that the contents of this questionnaire/forms (SBD 4, 8 & 9) are within my personal knowledge and are to the best of my belief both true and correct
- v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.
- vi) confirms that the bidder has read the General Conditions of Contract (GCC) and agree with the conditions. The GCC can be found on SANSA website (<http://www.sansa.org.za/images/Procurement/GCC/GCC.pdf>)

Signed

Date

Name

Position

*Enterprise
name*

Bid Conditions

1. Disqualification

Please note that if a bid document is not filled in correctly or completely, or complied with the specification, or is delivered/send after the bid closing date and time, or the supplier is not registered on the CSD or supplier has a non-compliant tax status, then unfortunately that bidder will be disqualified. Please return this document with the supporting documents.

2. Bid Document Submission

Emailed tender documents will be accepted. However, the onus is on the tenderer to ensure that complete email documents have been received by the SANSA by the due date and time.

Please note that any alterations to the tender document other than filling in the tenderer's details and tender price will automatically disqualify the tenderer.

END