



RFP NUMBER:	RFP/SASSETA/222311103/1
DESCRIPTION:	Appointment of a suitably qualified service provider to oversee the automation of SASSETA's projects
PUBLISH DATE:	09 June 2023
CLOSING DATE:	03 July 2023
CLOSING TIME:	11h00 am
COMPULSORY BRIEFING SESSION DATE	N/A
VALIDITY PERIOD:	120 days from the closing date
PREFERENCE POINT SYSTEM	80/20
BID RESPONSES TO BE SUBMITTED ELECTRONICALLY OR HAND-DELIVERED/ COURIERED TO:	Proposals to be submitted electronically via email to automation@sasseta.org.za or be couriered, posted, or hand delivered to SASSETA Offices at Building 2 Waterfall Corporate Campus, 74 Waterfall Drive, Waterfall City, Midrand, 2090 for the attention of Ms. Lebo Hlombe, Quoting the reference (RFP/SASSETA/ 222311103/1)
ATTENTION:	Ms. Lebo Hlombe
<p>NB: Bidders to ensure that they sign the tender register at the reception when delivering their hardcopy bids. Bidders who will use Courier companies are to ensure that the Courier company writes the name of the bidding company on the tender register. Submissions not registered on the tender register will be disqualified from further evaluation.</p> <p>The email address (automation@sasseta.org.za) is for the submission of tender proposals only and will only be accessed after the tender closing date and time.</p> <p>Queries related to this tender are to be sent to scm01@sasseta.org.za</p>	

NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

SECTION B

1. Special Conditions of Bid and Contract
2. Invitation to Quote (SBD 1)
3. Pricing Schedule (SBD 3.1)
4. Declaration of Interest (SBD 4)
5. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
6. Submission Checklist
7. General Conditions of Contract (Annexure A)
8. Map to SASSETA offices (Annexure B)

NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.

1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be no briefing session for this Request for Proposal.

1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Lebo Hlombe** at scm01@sasseta.org.za by 12h00 on the **23 June 2023**. The bid number should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically via email to automation@sasseta.org.za (**maximum size of the email 30MB**)

OR

Hard-copy document to be couriered, posted hand-delivered to SASSETA Offices, Building 2, Waterfall Corporate Campus, 74 Waterfall Drive, Waterfall City, Midrand, 2090 for the attention of Ms. Lebo Hlombe, Quoting the reference (RFP/SASSETA/2223111031))

❖ Closing date and time: **03 July 2023 @ 11h00**

1.5 LATE BIDS

- 1.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.
- 1.5.2 The official Telkom time (dial 1026) will be used to verify the exact closing time (11h00)

1.6 DIRECTIONS TO SASSETA OFFICES FOR DELIVERY OF BIDS

- 1.6.1 Directions to SASSETA offices are attached as **Annexure B** to this document.
- 1.6.2 Bidders should allow time to access the premise due to security arrangements that need to be observed.

1.7 FORMAT OF BIDS

1.7.1 Bidders to complete all the necessary bid documents and undertakings required in this bid document. Bidders are advised that their bid should be concise, written in plain English and simply presented.

1.7.2 Bidders are to set out their bid in the following format:

Part 1: Invitation to Bid (SBD 1)

Bidders to complete and submit the Invitation to Bid document.

Joint Ventures and Consortia are to submit their individual agreements in order to be evaluated as such. A Trust is to submit a Certificate of Trust to be evaluated. Submissions made without the requested documents will not be considered.

Part 2: Pricing (SBD 3.3)

Bidders to complete SBD 3.3 as attached to this request in full and to submit their own detailed quotation on their Company letterhead inclusive of VAT and any other costs as per the requirements of the Terms of Reference. **Bidders to attach their quotation on the company letterhead as part of SBD 3.3**

The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.

Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:

- Claim travel mileage costs applicable to this contract as per the Department of Transport rates
- Book only economy-class flights
- Book Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
- Utilise cost-effective mode of transport such as Uber/Taxify/Gautrain or shuttle services when traveling to and from the airport.
- Book only Bed and Breakfast, Hotels, or other equivalent accommodations up to a Rand value of R1 400/ three (3) Star per night per person (including dinner, breakfast, and parking).
- Submit all applicable invoices/receipts for the travel undertaken and also, a google map of the trip where travel by private car was undertaken for payment.
- All travel to be approved by SASSETA before being undertaken

Part 3: Declaration of Interest (SBD 4)

Each party to the bid to complete and submit the Declaration of Interest.

Part 4: Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)

Bidders to complete and submit the Preference Points Claim Form.

A trust, consortium, or joint venture:

- ❖ will qualify for points for their Specific Goals status level as a legal entity, provided that the entity submits their B-BBEE status level certificate OR a Letter from a registered Accounting Officer/ Auditor OR a sworn affidavit in terms of the Amended B-BBEE Codes from Exempted Micro Enterprises (EMEs) of R10 000 000 annual turnover.
- ❖ will qualify for points for their Specific Goals status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Part 5: General Conditions of Contract

Bidders to initial each page of the General Conditions of Contract and submit with their bid document.

Part 6: Bidders National Treasury CSD registration report

Bidders to submit their CSD report indicating the validity of the bidder's registration.

Part 7: Quotation on the Company letterhead of the Bidding Company

Bidders are to attach a quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with SBD 3.3.

Part 8: Technical approach and Project implementation Plan

Bidders to submit a technical approach and a high-level Project Implementation plan demonstrating key activity, milestones and the project resource plan to support the project. Bidders to talk to tasks, activities, milestones, contingency plan, resources, timeframes and risk management)

Part 9: Reference Letters

Bidders to submit four (4) or more written reference letters from clients (existing or previous) for managing automation and/or digitisation projects. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider/Bidding company.

Part 10: Experience of the Project Manager/Team Leader

CV of the Project Manager/Team Leader demonstrating five (5) or more years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc to be submitted.

Part 11: Qualifications of the Project Manager/Team Leader

Proof of certificate and qualification of the project manager/team leader: Project Management Professional certificate and NQF level 7 ICT qualification to be submitted. International qualifications must be verified by SAQA and copies of letters confirming verification to be submitted with bidding documents.

Part 12: Experience of the 3 X ICT Project Specialists

CVs of three (3) ICT project specialists to be submitted demonstrating three (3) or more years of experience in the following fields collectively:

- ICT Infrastructure Management
- Network Management
- ICT Security Management

1.8 NEGOTIATION

- 1.8.1 SASSETA has the right to enter into a negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.
- 1.8.2 SASSETA shall not be obliged to accept the lowest of any quotation, offer or bid.
- 1.8.3 SASSETA issues this bid invitation in good faith; however, it reserves the right to:
- ❖ Cancel or delay the selection process at any time, without explanation,
 - ❖ Not to select any of the respondents to this bid invitation, without explanation,
 - ❖ Exclude certain services, without explanation.
- 1.8.4 A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible person of both parties.

1.9 REASONS FOR REJECTION

- 1.9.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.
- 1.9.2 SASSETA may disregard the bid of any bidder if that bidder, or any of its directors:
- 1.9.2.1 have abused the Supply Chain Management systems of SASSETA.
 - 1.9.2.2 have committed proven fraud or any other improper conduct in relation to such systems.
 - 1.9.2.3 have failed to perform on any previous contract and the proof exists.
 - 1.9.2.4 Such actions shall be communicated to the National Treasury.

2. TERMS OF REFERENCE

2.1. INTRODUCTION AND BACKGROUND

- 2.1.1. SASSETA was established on 1 July 2005. It is one of the twenty-one Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's licence has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.
- 2.1.2. SASSETA utilises Information and Communication Technology (ICT) as the platform for business operations and communications as well as to manage and provide access to its systems and communicate with its stakeholder.

2.2. BACKGROUND, PROBLEM STATEMENT AND PURPOSE OF THIS RFP

- 2.2.1. In the financial year 2019/20, SASSETA conducted a business process review, analysis, design and automation opportunity identification exercise.
- 2.2.2. A report that set out the following in respect of each department within the SETA was compiled:
- a gap analysis report;
 - business process report;
 - risk report;
 - flow chart and automation recommendations.
- 2.2.3. The automation recommendations were converted into an action plan and the ICT systems to be procured were placed on to the procurement plan. ICT reports quarterly to the ICT Steering Committee on the ICT projects currently being implemented.
- 2.2.4. Those automation projects that are part of the current ICT projects are mostly at the project planning/consolidation of specification phase. There are different project teams that are working on these 'projects. The deliverable and output of these projects are systems that must be seamlessly integrated.
- 2.2.5. Within the same financial year (2019/20), SASSETA developed the ICT Digital Transformation Strategy and performed the review on the ICT Master System Plans (Strategy).

2.3. PROBLEM STATEMENT

- 2.3.1. The implementation of the ICT Strategy at the SASSETA followed the traditional life cycle of strategy formulation, implementation of the strategy through the identification of the organisation's initiatives (projects), developing the road maps, budget and incorporating the newly developed ICT Digital Transformation strategy.
- 2.3.2. SASSETA is striving for a mechanism to optimise and continuously improve overall efficiencies and effectiveness. The organisation wishes to improve some of the business challenges which are but not limited to:

- Overreliance on manual processes and slow implementation of digitisation
- Limited integration and compatibility of systems/ applications
- Low user adoption, caused by the discomfort and exposure to technology.
- Limited ICT Staff capacity to support organisational needs.
- Geographic distribution of stakeholders and users leads to limited/ delayed access to SASSETA.

2.4. PURPOSE

- 2.4.1. The purpose of this tender is to appoint a suitably qualified Service Provider to render (technical support and professional advisory services for the ICT systems development and implementation of Digital Transformation System) automation services for organisation's ICT projects.

2.5. SCOPE OF WORK, SERVICES AND DELIVERABLES REQUIRED

- 2.5.1. The service provider is expected to provide the following services and products:
- 2.5.1.1. Provide technical support and professional advisory services for the organisation's ICT systems and policies development and implementation of digital transformation at SASSETA for a period of three (3) years.
- 2.5.1.2. Propose a comprehensive methodology or framework for the advisory on the digitisation strategy formulation and implementation process.
- 2.5.1.3. Review of the ICT Strategy, Digital Transformation Strategy, systems architecture, flow chart and automation recommendations and identify misalignment with business strategy and develop a digital transformation road map, The Misalignment should cover human factors (i.e. skills, interaction and training) and Operational factors (i.e. business model, innovation, project management).
- 2.5.1.4. Review the extent to which the current automation SLA meet the organisational requirements as recommended in the business process project.
- 2.5.1.5. Produce a gap analysis report and engage business units on the best solutions to automate.
- 2.5.1.6. Develop a project charter including cost management plan and budget in consultation with the various business units.
- 2.5.1.7. Develop a business case for the digital transformation and integration of the ICT Systems in consultation with the relevant business units.
- 2.5.1.8. Provide technical advisory expertise during the procurement process (review digitisation specifications and terms of reference) for enhancement, develop and integration of ICT Systems in consultation with the relevant business units.
- 2.5.1.9. Review and revise processes and workflow in consultation with the relevant business units.

- 2.5.1.10. Provide inputs into the SLAs developed by SASSETA for the various ICT projects identified.
- 2.5.1.11. Support projects in line with approved project management methodologies and submit the necessary documentation.
- 2.5.1.12. Develop the digitisation Risk Management Plan (strategic risks, mitigation, exclusions, assumptions and critical factors for the successful implementation of the digital transformation).
- 2.5.1.13. Review and provide inputs on the approved ICT progress reports and recommend payments where required in consultation with the relevant business units.
- 2.5.1.14. Provide timely, clear and concise project status and management reports to the relevant Stakeholders.
- 2.5.1.15. Conduct an in-depth analysis and review of the program implementation including insights, handover of incomplete and continuing tasks, recommendations for a fit for purpose ICT structure and infrastructure capacity requirements to the ICT department.
- 2.5.1.16. Maintain and support client relationships and expectations.

2.6. TIMEFRAMES FOR DELIVERY OF THE WORK

- 2.6.1. This assignment will be for a period of three (3) years from the date of appointment.

2.7. SUBMISSION REQUIREMENTS

- 2.7.1. Submission of a technical approach and a high-level Project Implementation Plan demonstrating key activity, milestones and the project resources plan to support the project.
- 2.7.2. The Bidding Company to submit four (4) or more written reference letters from clients (existing or previous) for managing automation and/or digitisation projects. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider.
- 2.7.3. CV of the project manager/team leader demonstrating five (5) or more years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc to be submitted.
- 2.7.4. Proof of certificate and qualification of the project manager/team leader: Project Management Professional certificate and NQF level 7 ICT qualification to be submitted. International NQF aligned qualifications must be verified by SAQA and copies of letters confirming verification to be submitted with bidding documents.
- 2.7.5. CVs of three (3) ICT project specialists to be submitted demonstrating three (3) or more years of experience in the following fields collectively:
 - ICT Infrastructure Management
 - Network Management

- ICT Security Management

2.8. PRICING

- 2.8.1. The service provider will be required to provide all-inclusive costs of this project on the SDB 3.3 document, all inclusive of VAT.

2.9. ACCOUNTABILITY AND REPORTING

- 2.9.1. The service provider will report directly to the ICT Manager for the duration of the contract.

2.10. INTELLECTUAL PROPERTY

- 2.10.1. The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analysed, will be the confidential information for utilisation by SASSETA. All information and documents received from SASSETA is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the SLA.

3. PROPOSED SELECTION CRITERIA

3.1 Compliance requirements

- 3.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions. Bids with obvious deviations from the requirements/conditions, will be eliminated from further evaluation.

3.2 Conditions for selection/short listing

- 3.2.1 All submissions will be evaluated as follows:

3.2.1.1 Phase 1 – Required items, Service Providers to:

- Submit their responses/bidding documents by the closing date and time. **Responses/bidding documents submitted after the date and time will be disqualified from further evaluation.**
- Register the responses/bidding documents in the tender register at SASSETA reception. **Responses/bidding documents not recorded on tender submission register at SASSETA reception will be disqualified from further evaluation.**
- complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD3.1, SBD4, SBD 6.1.
- Bidders to be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with your proposal.

3.2.1.2 Phase 2 – Functionality evaluations

- All shortlisted proposals from phase 1 will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 0 to 2 as follows:

0: Required document/item not submitted /Unacceptable, does not meet set criteria

1: Satisfactory should be adequate for stated element

2: Very good, above average compliance to the requirement

PROPOSED SELECTION CRITERIA

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
Proposed Technical approach and methodology of the bidder	Rating out of	Evaluation criteria		
Bidder to submit a technical approach and a high-level Project Implementation plan demonstrating key activity, milestones and the project resource plan to support the project. Bidder to talk to tasks, activities, milestones, contingency plan, resources, timeframes and risk management) 40 points	0	Bidder did not submit or submitted an inadequate technical approach/project implementation plan	40%	
	1	Bidder submitted a technical approach addressing all deliverables mentioned in section 2.5 of the TORs document. Bidder submitted high-level project implementation plan covering all the elements (tasks and activities, milestones and contingency plan, resources, timeframes and risk management)		
Suitability of the bidder:				
The Bidding Company to submit four (4) or more written reference letters from clients (existing or previous) for managing automation projects. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider/Bidding company. (30 points)	0	Bidder did not submit reference letters or Bidder submitted less than four (4) reference letters.	30%	
	1	Bidder submitted three (3) reference letters from clients (existing or previous) for managing automation projects. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider/Bidding Company.		
	2	Bidder submitted four (4) or more reference letters from clients (existing or previous) for managing automation projects. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider/Bidding Company.		
Suitability of the proposed team leader:				
The Bidding company to submit a CV of the Project Manager/Team Leader demonstrating five (5) or more years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc. (10 points)	0	The Bidding company did not submit the CV of the project manager / team leader or CV of the project leader has less than five (5) years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc.	10%	

	1	CV of the project leader demonstrates four (4) years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc.		
	2	CV of the project manager/team leader demonstrates five (5) or more years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc.		
Bidding company to submit the project manager/team leader's proof of qualifications in project management (certificate) and ICT (NQF level 7). International NQF aligned qualifications must be verified by SAQA and a copy of letters confirming verification. (10 points)	0	Bidding company did not submit one or both project manager/team leader's proof of qualifications in project management (certificate) and ICT (NQF level 7).	10%	
	1	Bidding company submitted the project manager/team leader's proof of qualifications in project management (certificate) and ICT (NQF level 7).		
The Bidding company submitted CVs of three (3) ICT project specialists demonstrating three (3) or more years of experience in the following field collectively: A) ICT Infrastructure Management B) Network Management C) ICT Security Management (10 points)	0	The bidding company did not submit any CVs or submitted less than three (3) CVs of ICT project specialists or three (3) CVs submitted but not all demonstrate three (3) years of experience collectively in the following fields A) ICT Infrastructure Management B) Network Management C) ICT Security Management		
	1	The bidding company submitted <u>CVs</u> of three (3) ICT project specialists demonstrating <u>three (3) or more years of experience</u> in one of the following fields: A) ICT Infrastructure Management B) Network Management C) ICT Security Management	10%	
TOTAL			100	

N/B: Bidders need to obtain a minimum of 70% for functionality for them to be evaluated further on the 80/20 preference point system. Bidders who obtain less than 70% for functionality will be eliminated from further evaluation.

3.2.1.3 Phase 3 – Price and Specific Goals

- **The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:**

Evaluation Criterion on Price and BBBEE	
Relative competitiveness of proposed price	80
Specific Goals	20
TOTAL FOR PRICE AND PREFERENCE	100

3.3 ADJUDICATION OF BID

3.3.1 The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable and justifiable grounds, or no award at all.

PART A - INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)

BID NUMBER:	RFP/SASSETA/222311103/1	CLOSING DATE:	03 July 2023	CLOSING TIME:	11h00
DESCRIPTION	Appointment of a suitably qualified service provider to oversee the automation of SASSETAs projects.				

PROPOSALS TO BE EMAILED:

Proposals to be submitted electronically via email to automation@sasseta.org.za **OR** be couriered, posted or hand delivered to SASSETA Offices, Building 2 Waterfall Corporate Campus, 74 Waterfall Drive, Waterfall City, Midrand, 2090 for the attention of Ms. Lebo Hlombe.

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**

CONTACT PERSON	Ms. Lebo Hlombe	CONTACT PERSON	Ms. Lebo Hlombe
E-MAIL ADDRESS	scm01@sasseta.org.za	E-MAIL ADDRESS	scm01@sasseta.org.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
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> 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, 2022, 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 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.

NAME OF SIGNATORY

SIGNATURE OF BIDDER:

N/B.: If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

N/B.: If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

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

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO.: RFP/SASSETA/222311103/1

CLOSING TIME:..... CLOSING DATE: **03 July 2023**

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
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1. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

A. ONCE-OFF COSTS

NO.	ITEM DESCRIPTION	Total Costs
IMPLEMENTATION AND INITIAL SETUP COSTS		
1.	Review of the ICT Strategy, Digital Transformation Strategy, systems architecture, flow chart, and automation recommendations	R
2.	Delivery of the comprehensive five (5) year digitisation strategy framework	R
3.	Delivery of the Gap analysis report	R
4.	Delivery of the Business case and the Project Implementation plan	R
5.	Delivery of the Project Charter	R
6.	Review and revise processes and workflow in consultation with the relevant business units.	R
7.	Close-out report – comprising an in-depth analysis and the review of the program implementation (insights, incomplete projects, etc.)	R
8.	TOTAL COSTS	R

B. AD HOC COST

No.	ITEM DESCRIPTION	HOURLY RATES (incl. VAT) (Y1)	HOURLY RATES (incl. VAT) (Y2)	HOURLY RATES (incl. VAT) (Y3)
1.	Technical support and professional advisory services including but not limited to: <ul style="list-style-type: none"> • review of SLAs, • project management • review the approved ICT progress reports • Provide technical advisory expertise during the procurement process • Submission of reports as and when required 			

Bidders are to complete the names and surnames of the proposed team on this assignment and ensure that comprehensive CVs of these members are attached to the proposal as follows:

NO.	ROLE IN THE TEAM	NAME AND SURNAME (Bidders to indicate <u>one</u> (1) name per role below)	IS THE CV ATTACHED (Circle the response below)
1.	1 X Team Leader/Project Manager		Yes/No
2.	1 X ICT Project Specialist		Yes/No
3.	1 X ICT Project Specialist		Yes/No
4.	1 X ICT Project Specialist		Yes/No

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly Authorised Delegate)

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 interest 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

Full Name	Identity Number	Name of State institution

N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above

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**

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/N

O

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 consortium¹ 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.
- 3.5 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.
- 3.6 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.
- 3.7 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.

.....

¹ 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.

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

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

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

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to quote:
- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

The applicable preference point system for this quotation is the **80/20** preference point system.

- a) The lowest acceptable quotation will be used to determine the accurate system once quotations are received.

- 1.3 Points for this quotation (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:

- 1.5 The maximum points for this quotation are allocated as follows:

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

- 1.6 Failure on the part of a bidder to submit proof or documentation required in terms of this bid to claim points for specific goals with the quotation, will be interpreted to mean that preference points for specific goals are not claimed.**

- 1.7 The organ of state reserves the right to request a bidder, either before a quotation 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

3.2 POINTS AWARDED FOR SPECIFIC GOALS

3.2.1 In terms of Regulations 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 quotation.

3.2.2 For the purposes of this quotation, the bidder 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 bid:

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

Note to bidders: The Bidder must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this bid	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the bidder)
Black People Ownership (>51% blacks)	10.00	
Black Women Ownership (>30% blacks)	5.00	
The promotion of South African – owned enterprises	5.00	
Total	20.00	

DECLARATION WITH REGARD TO COMPANY/FIRM

3.3 Name of company/firm.....

3.4 Company registration number:

3.5 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]

3.6 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 quotation, 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 bidding 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 bidder 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 BIDDER(S)	
SURNAME AND NAME:
DATE:
ADDRESS:

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
- c) Certified copy/ies of Identity documents of the Company Directors
- d) CSD report
- e) Shareholder Certificates
- f) declaration letter signed by the bidder.

NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted).

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation

BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

NO.	DETAILS	TICK BY BIDDER
1.	Part 1: Completed and signed the invitation to bid document (SBD 1) To be signed by a duly Authorised Delegate.	
2.	Part 2: Completed and signed pricing schedule (SBD 3.3) To be signed by a duly Authorised Delegate.	
3.	Part 3: Completed and signed the bidder's declaration (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document).</i> To be signed by a duly Authorised Delegate	
4.	Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) To be signed by a duly Authorised Delegate. Not claiming points as per SBD 6.1 will lead to Specific Goals points not awarded	
5.	Part 5: Submitted the General Conditions of Contract (initialled each page)	
6.	Part 6: Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration	
7.	Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3	
8.	Part 8: Submission of a technical approach and a high-level Project Implementation Plan demonstrating key activity, milestones and the project resources plan to support the project.	
9.	Part 9: The Bidding Company to submit four (4) or more written reference letters from clients (existing or previous) for managing automation and/or digitisation projects. Reference letters must be on the client's letterhead, signed and clearly detailing the scope of work, duration and impression the client has with the service provider.	
10.	Part 10: CV of the project manager/team leader demonstrating five (5) or more years of experience in managing automation projects using common methodologies such as PMBOK, Prince 2, Agile etc to be submitted.	
11.	Part 11: Proof of certificate and qualification of the project manager/team leader: (Project Management Professional certificate and NQF level 7 ICT qualification to be submitted. International NQF aligned qualifications must be verified by SAQA and copies of letters confirming verification to be submitted with bidding documents.	
12.	Part 12: CVs of three (3) ICT project specialists to be submitted demonstrating three (3) or more years of experience in the following fields collectively: <ul style="list-style-type: none"> • ICT Infrastructure Management • Network Management • ICT Security Management 	
13.	Part 10: Bidders to submit: NB.: Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded.	
	Valid Companies and Intellectual Property Commission (CIPC) Company registration documents	
	Certified copy of Identity document of company directors	
	medical report (if any)	
	declaration letter signed by the bidder	

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