

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE DMRE WITH BACKUP AND DISASTER RECOVERY SERVICES FOR CORE APPLICATIONS FOR A PERIOD OF 36 MONTHS.

1. BACKGROUND

DMRE currently uses Veeam Backup & Replication is currently deployed at Head Office and SITA, as well as all regional sites. The backup hardware infrastructure is aged and will need to be replaced as part of the managed backup service. DMRE currently make use of physical tape for the long-term retention of their backup data.

The current Department of Mineral Resources and Energy (The Department) Data and telephone infrastructure is running on Data (Dell, EMC storage and HP). The current virtualization software is VMware and Hyper-V visor for other regional branches. The long-term backup strategy currently utilizes tape technology.

The infrastructure is out of warranty and has reached the end of life which means that the spares equipment's are no longer available in the market and support is limited from the vendors/suppliers.

The hardware has completed eight-year lifespan and the managed services has lapsed.

The solution will be deployed to all sites as per the table below:

NB: The location of sites might change due to planned facilities plan.

Table 1: List of sites

Province	Office
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1.Gauteng	Pretoria (HQ): Matimba House and Trevena Campus Braamfontein, Johannesburg
2.Mpumalanga	Witbank
3.Free State	Welkom
4.Limpopo	Polokwane
5.North-West	Klerksdorp Rustenburg Mahikeng
6.Northern Cape	Kimberly Springbok
7.Eastern Cape	Port Elizabeth Umtata
8.Western Cape	Cape Town
9.Kwazulu Natal	Durban
10 Johannesburg	Johannesburg

The Department of Mineral Resources and Energy (DMRE) intends to appoint a service provider with suitable skills and experience to provide DMRE with backup and disaster recovery service all DMRE core applications.

2. CONTRACT PERIOD

The duration of the contract is 36 months

3. OBJECTIVE

The specific objective is to supply backup service for DMRE environment to ensure data availability in case of failure. This service will include refreshing the

entire backup infrastructure while maintaining existing backup image history (data migration), continuous daily backup and testing and end to end management of the implemented service.

The Department wants to implement Backup as a Service. This service must include the backup of the entire DMRE infrastructure as well as the management of the environment. DMRE currently makes use of Veeam Availability Suite that includes Veeam Backup & Replication as well as Veeam ONE to protect their Virtual and Physical servers.

DMRE is also looking to implement deduplicating storage as a replacement to their existing external SAN backup storage giving them the ability to leverage reduction of backup data stored as well as improving the performance of their backup infrastructure.

The Department also requires that Disaster Recovery to Microsoft Azure be configured for four regional sites.

In order to facilitate disaster recovery to Microsoft Azure, DMRE also requires the provisioning of redundant a 50 Mbps Internet Fibre lines at Head Office for internet connectivity

4. SCOPE OF WORK

The Department needs backup:

4.1 Managed Backup Service - The cost of the service must be included in the monthly service fee.

4.1.1 Daily onsite or remote monitoring of the Veeam Backup and Replication infrastructure.

4.1.2 Day-to-day backup administration

4.1.3 Backup performance tuning and optimisation

4.1.4 Backup solution software patching

4.1.5 Ad hoc backup configuration

4.1.6 Planned and ad hoc restores

4.1.7 General backup troubleshooting

4.1.8 Monthly reporting

4.1.9 24x7 Remote managed backup support t and standby engineers for the Veeam Backup and Replication as well as the new backup hardware infrastructure.

4.2 Backup Data storage

4.2.1 The required backup target-based deduplication appliance/s must be made available by the service provider for Veeam Backup and Replication to function optimally. The current backup storage requirement of 200TB should be used as a base. Not restricting service provider expertise to propose any efficiencies regarding size

4.2.2 The backup storage must be capable of;

4.2.2.1 In-line deduplication

4.2.2.2 Immutable snapshots

4.2.2.3 Veeam data mover service integration

4.2.2.4 Capacity on demand storage growth

4.2.2.5 Second backup copy needs to be on tape and must be physically air-gapped

4.3 Regional servers

4.3.1 Service provider will be required to provide on-premises servers to all regional offices as specified by DMRE.

4.3.2 Ensure that all servers are configured and functional before hand over

4.4 Availability and Disaster Recovery

4.4.1 DMRE requires 99.5% availability. SLA breach by the service provider to meet this target will result in penalties payable as per predetermined penalty clauses.

4.4.2 The service provider must make use of tier two data centres to provide the stipulated services to DMRE.

4.4.3 Disaster recovery tests of DMRE hosted servers in Azure must be conducted every six months by the service provider and the results reported to DMRE.

4.5 Backup Requirements

- 4.5.1 The service provider must provide a managed backup service for DMRE that meets the requirements listed below.

4.5.1.1 Backup schedule:

- 4.5.1.1.1 Daily incremental backups on Monday to Thursday.
- 4.5.1.1.2 Weekly full backups on weekends.
- 4.5.1.1.3 Monthly full backups on the last Friday of the month.
- 4.5.1.1.4 Yearly full backups on the last Friday of the last month of the year.

4.5.1.2 Retention periods:

- 4.5.1.2.1 Daily backups retained for four (4) weeks
- 4.5.1.2.2 Weekly backups retained for four (4) weeks
- 4.5.1.2.3 Monthly backups retained for twelve (12) months
- 4.5.1.2.4 Yearly backups retained for five (5) years

4.5.2 System Performance

- 4.5.2.1 When failing over DMRE systems and applications to the Azure infrastructure, the experience of the end user must remain the same or improve. The service provider must indicate how system performance will be measured to ensure that performance degradation does not occur. Feedback on system performance must be provided at monthly SLA meetings between the DMRE and the service provider.

4.5.3 Data ownership

- 4.5.3.1 Should DMRE change to a new service provider at any time, DMRE must be guaranteed to have full access to all of its data in order to be able to move it to a new service provider. The service provider must provide proof that DMRE data has been destroyed once it has been transferred from the service provider's datacentres.

- 4.5.3.2 All data stored by the system is solely owned by the DMRE and should be always accessible.
- 4.5.3.3 The service provider's offered services must be compliant with the POPI Act.
- 4.5.3.4 The Service provider must be ISO 9001 certified and provide proof.

5.1 DELIVERABLES OR PROJECT OUTPUT AND OR OUT COME

5.1 The expected outputs are:

- 5.1.1 Provide managed services for Veeam Backup and Replication.
- 5.1.2 Provide licensing for the renewal of Veeam Availability Suite.
- 5.1.3 Provide long-term backup retention of backup data.
- 5.1.4 Provide backup hardware infrastructure.
- 5.1.5 Facilitate Disaster Recovery to Microsoft Azure from the central backup repositories and all sites.
- 5.1.6 Provide a 20Mbps Internet Fiber lines for Internet Connectivity.
- 5.1.7 All software and hardware supplied must include maintenance and support for minimum 3 years.
- 5.1.8 DMRE Solution Requirements Document information and Communications Technology
- 5.1.9 DMRE Group Policy Implementations document
- 5.1.10 Successful implementation of the project plan.
- 5.1.11 Project Charter
- 5.1.12 Stakeholder management plan including project organization structure and roles and responsibilities

- 5.1.13 Communications management plan
- 5.1.14 Risk management plan
- 5.1.15 Detailed project schedule and WBS
- 5.1.16 Sample solution technical/ solution management reports
- 5.1.17 Bi-Weekly and monthly status and progress reports
- 5.1.18 Project closing presentation
- 5.1.19 Project conclusion document outlining work completed, lessons learned and recommendations for “next steps”
- 5.1.20 SLA document will be drawn up with a successful bidder. Service provider to provide draft with clear deliverable, categories/ classification of service, turnaround times as a minimum
- 5.1.21 Review or develop Backup policies, procedures and processes
- 5.1.22 Backup architecture
- 5.1.23 Assessment report of current setup, data utilization and improvements thereof with aim to reduce any existing inefficiencies
- 5.1.24 Warranty Document detailing what will be covered and duration as minimum and License Packs/Portal
- 5.1.25 Skill transfer plan and implementation thereof

6. COMPANY EXPERIENCE

- 6.1 Service provider should have minimum of five (5) years’ experience in implementation of the similar project that is size (the number of users must be more than 1000) and complexity with a regional presence.
- 6.2 Service provider is required to provide proof in form of testimonial indicating that they have successfully implemented similar project. The testimonial(s) or reference letter(s) must be in signed and in letterhead of company that received

the services, duration of the project executed and contact details for verification purposed.

- 6.3 Testimonials should reflect projects executed within 5 years from date of closure of this bid. These testimonials will be used as proof of experience.
- 6.4 Company must be Gold or higher partner level to the OEM of the proposed solution. Failure to submit proof of partnership will lead to disqualification
- 6.5 DMRE reserves the right to contact the persons on the Testimonial/s or Reference Letter/s should include contact details for verification purposes.

7. QUALIFICATION AND EXPERIENCE OF PROJECT MANAGER AND TEAM MEMBERS

7.1 PROJECT MANAGER

- 7.1.1 Should have certification in Project Management and the certification of the proposed s solution(s). 3 Years qualification in Information Technology or equivalent is added advantage.

7.2 TEAM MEMBERS:

- 7.2.1 Should have certification in backup solution proposed and 3-years' qualification in Information Technology or equivalent is added advantage
- 7.2.2 The team members should have minimum three (3) year relevant experience specific to backup solution proposed project management in information technology.

8. PROJECT PLAN AND METHODOLOGY

- 8.1 The service provider should provide the following:
 - 8.1.1 Detailed methodology to be used to execute and deliver the artifacts of the project in line with the scope of work.
 - 8.1.2 Clearly define tasks, timelines, and resources responsible or tasks as per provided CV and clear dependencies.
 - 8.1.3 Detailed rollout plan

8.1.3.1 Detailed migration plan

8.1.3.2 The proposal should detail the dependencies from the Department to ensure successful implementation of project.

9. TECHNICAL PROPOSAL

- 9.1 The company's technical proposal should clearly demonstrate that they understood the TOR requirements, have adequate resources (be able to service all regions) to execute the project within the stipulated turnaround times.
- 9.2 Proposal should also include detailed implementation approach.
- 9.3 Must clearly indicate technology maturity and the proposed technology standing in the industry.
- 9.4 All shortlisted service providers will be expected to do a presentation where points will be allocated.
- 9.5 Detailed data migration plan

10. REPORTING REQUIREMENTS

- 10.1 This project will be implemented in line with the Scope of work and will be managed based on the following:
- 10.2 Service provider will report to the Chief Information Officer or delegated official.
- 10.3 Service provider will be expected to provide various reports monthly (e.g., project status report) in a form of Portable Document Format (PDF)/Microsoft standard format, as well as provide any other project related report/s as requested by the Department.
- 10.4 Service provider will be expected to have compulsory meetings with the Department in accordance with service level agreement for the duration of the lease agreement. In case of emergencies, either party may propose a meeting and both parties must reasonably avail themselves for such a meeting.

- 10.5 Service provider will be expected to provide all the project management documents in with the DMRE methodology.

11. ROLES AND RESPONSIBILITIES

11.1 The Department will be responsible for:

- 11.1.1 Provide documentation of the current infrastructure.
- 11.1.2 Provide access to the current infrastructure.
- 11.1.3 Provide rack space, power and cooling for any equipment to be installed onsite.
- 11.1.3 Manage and monitor the delivery of services through the SLA which will include periodic performance review.

11.2 The Service provider will be responsible for:

- 11.2.1 The Service Provider shall perform strictly in accordance with the requirements of the Terms of Reference and Service Level Agreement.
- 11.2.2 The Service Provider shall at all material times act diligently, reasonably and with care, when dealing with all Departmental information and/or intellectual property belonging to the Department.

12. CONFIDENTIALITY OF INFORMATION

- 12.1 All information shared during this bidding process and implementation of this project should the service provider be appointed, remains the property of DMRE and should be kept with the highest confidentiality and cannot be used or shared for any other purpose.

12. PAYMENT

- 12.1 The Department will not make an upfront payment to a successful service provider. Payments will only be made in accordance to the delivery of service that will be agreed upon by both parties and receipt of an original invoice.

13. TAX CLEARANCE CERTIFICATE

- 13.1. The potential service provider/s must ensure compliance with their tax obligations.
- 13.2. The potential service provider/s is/are required to submit their unique personal identification number (pin) issued by SARS to enable the organ of state to view the taxpayer's profile and tax status.
- 13.3 Application for tax compliance status (TCS) or pin may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as e-filers through the website www.sars.gov.za.
- 13.4. The potential service provider may also submit a printed TCS together with the proposal.
- a. In proposals where consortia / joint ventures / sub-contractors are involved, each party must submit a separate proof of TCS / pin / CSD number.
 - b. Where no TCS is available but the potential service provider/s is registered on the central supplier database (CSD), a CSD number must be provided

14. EVALUATION METHODOLOGY

14.1 Phase 1: Compliance and Technical Review:

Phase 1: Compliance review:

Each submission is checked for compliance. If the submission complies, it will move to the next round in the evaluation process.

The following documentation is required and will be checked for compliance purposes:

Compliance Criteria

- A valid and original Tax Clearance Certificate
- An originally signed B-BBEE Certificate or affidavit
- Signed SBD forms

Disqualifying criteria:

- Signed accreditation certificates on letter head:
- OEM Gold or higher accreditation for software and hardware
- OEM Gold or higher accreditation for all solutions offered

Phase 2: Technical review

Each submission is evaluated by the bid evaluation committee according to the evaluation criteria indicated in the bid document.

A score is allocated to each proposal and if the document scored more than the minimum requirement for functionality of 70%, service providers will be eligible to move to the next round on evaluation stage which is presentation of proposal and cost.

14.1.1 Each submission is checked for compliance. The following documents are compulsory:

A valid Tax Clearance Certificate	
A valid B-BBEE Certificate	
Signed SBD forms	
Proof of CSD registration	

Disqualification criteria (if available, e.g. registration with professional body)	<ul style="list-style-type: none"> Signed accreditation certificates on letter head: OEM Gold or higher accreditation for software and hardware OEM Gold or higher accreditation for all solutions offered
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14.1.2 Service providers will be evaluated based on functionality. The minimum threshold for functionality is 70 out of 100 points. Service providers who fail to meet the minimum threshold will be disqualified and will not be evaluated further for price and preference points for B-BBEE.

NO	CRITERIA	SCORING	WEIGHTS
1	Company Experience: Service provider should have minimum of five (5) years' experience in implementation of the similar project that is size (the number of users must be more than 1000) and complexity with a regional presence. Service provider is required to provide proof in form of testimonial indicating that they have successfully implemented similar project. The testimonial(s) or reference letter(s) must be in	7 years or more = 5 points 6 years = 4 points 5 years= 3 points 4 years= 2 points 3 or less =1 point	15

	signed and in letterhead of company that received the services, duration of the project executed and contact details for verification purposed.		
2	<p>PROJECT MANAGER</p> <p>Should have certification in Project Management and the certification of the proposed solution(s). 3Years' qualification in Information Technology or equivalent is added advantage.</p> <p>The project manager should have minimum five (5) year relevant experience specific to project management in information technology.</p>	<p>QUALIFICATIONS:</p> <p>3 Years formal qualification and Project management certification and proposed solution certificate = 5 points</p> <p>project management certification and proposed solution certificate = 3 points</p> <p>No Project management certification in proposed solution = 1 points</p> <p>EXPERIENCE</p> <p>6 years' experience or more = 5 points</p> <p>5 years' experience = 3 points</p> <p>Less than 3 years' experience = 1 points</p>	<p>10</p> <p>10</p>

3.	<p>TEAM MEMBERS</p> <p>Should have certification in backup solution proposed and 3-years' qualification in Information Technology or equivalent is added advantage</p> <p>The team members should have minimum three (3) year relevant experience specific to backup solution proposed</p>	<p>QUALIFICATIONS:</p> <p>3 Years or higher formal qualification and backup solution certification in proposed solution = 5 points</p> <p>3 Years formal qualification and backup solution certification in proposed solution = 3 points</p> <p>No 3 Years formal qualification and backup solution certification in proposed solution = 5 points= 1 point</p> <p>EXPERIENCE</p> <p>5 years' experience or more = 5 points</p> <p>3 years' experience =3 points</p> <p>Less than 3 years' experience = 1 points</p>	<p>10</p> <p>10</p>
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4	<p>PROJECT PLAN AND METHODOLOGY</p> <p>Detailed methodology to be used to execute and deliver the artifacts of the project in line with the scope of work.</p> <p>Clearly define tasks, timelines, and resources responsible or tasks as per provided CV and clear dependencies.</p> <p>Detailed rollout plan</p> <p>Detailed migration plan</p> <p>The proposal should detail the dependencies from the Department to ensure successful implementation of project</p>	<p>Detailed methodology in line with scope of work, clearly defined task timelines and resources detailed rollout plan and detailed data migration plan and dependencies identified. Project timelines one month before target date =5 Points</p> <p>=5 Points</p> <p>Detailed methodology in line with scope of work, clearly defined task timelines and resources detailed rollout plan and detailed data migration plan and dependencies identified =3 Points</p> <p>No Detailed methodology in line with scope of work, not clearly defined task timelines and resources No detailed rollout plan and no detailed data migration plan and dependencies identified =1 Points</p>	20
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5	<p>TECHNICAL PROPOSAL</p> <p>The company's technical proposal should clearly demonstrate that they understood the TOR requirements, have adequate resources (be able to service all regions) to execute the project within the stipulated turnaround times.</p> <p>Proposal should also include detailed implementation approach.</p> <p>Must clearly indicate technology maturity and the proposed technology standing in the industry.</p> <p>All shortlisted service providers will be expected to do a presentation where points will be allocated.</p> <p>Detailed data migration plan</p>	<p>Company proposal attached in line with TOR and scope of work, implementation plan clear, must clearly indicate technology maturity and the proposed technology standing in the industry =5 Points</p> <p>Company proposal attached in line with TOR and scope of work, implementation plan clear =3 Points</p> <p>No Company proposal attached in line with TOR and scope of work, implementation plan not clear =1 Point</p>	25
Total			100

For purpose of evaluating functionality, the following values will be applicable:

1=	Very poor	Does not understand the requirements
2=	Poor	Will not be able to fulfil the requirements

3=	Average	Will partially fulfil the requirements
4=	Good	Will be able to fulfil the requirements
5=	Excellent	Will fully fulfil the requirements

15. PHASE 2: PRICING AND BBBEE

15.1. Bids will be evaluated on the 80/20 preference point system as outlined in the Procurement Preferential Regulation of 2017. Bidder that scores the highest points in this phase will be awarded the tender.

CRITERIA	WEIGHT
Price	80
B-BBEE Status level contributor	20

16. COST / PRICING

16.2.1. The service provider will be requested to provide a quoted proposal regarding the work to be undertaken.

16.2.2 The total cost must be VAT inclusive and should be quoted in South African Rands (i.e. ZAR).

16.2.3 The service provider should provide hourly rates as prescribed by Department of Public Service and Administration (DPSA), Auditor- General (AG) or the body regulating the profession of the consultant.

16.2.4 The service Provider should provide (Subsistence & Travel (S&T)) rates that are in aligned to the National Treasury instruction note as follows:

- i) Hotel Accommodation – R1550 per night per person, including breakfast, dinner and parking
- ii) Air travel must be restricted to economy class
- iii) Claims for kilometres may not exceed the rates approved by the Automobile Association of South Africa.

16.2.1 Pricing should be explicitly listing each item to be delivered

16.2.2 Pricing should be milestone and aligned to how billing will take place

16.2.3 Configuration costs should be listed on time and material.

16.2.4 Service providers will be responsible for travelling costs

16.2.5 Service provider should clearly indicate any additional cost explicitly.

16.2.6 The Department will not make an upfront payment to a successful service provider unless stated. Payment will only be made in accordance point **12.1** above upon receipt of a fully compliant invoice and agreed SLA delivery standards

17. BROAD-BASED BLACK ECONOMIC EMPOWERMENT

17.1 Provisions of the Preferential Procurement Policy Framework Act (PPPFA) of 2000 and its

regulation of 2017 will apply in terms of awarding points.

17.2 Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or

certified copies thereof together with their bids, to substantiate their B-BBEE rating claims.

17.3 Bidders who do not submit their B-BBEE status level verification certificates or are non-compliant

contributors to B-BBEE will not qualify for preference points for B-BBEE.

17.4 Accounting Officers must ensure that the B-BBEE Status level Verification Certificates submitted

are issued by the following agency:

- Verification agencies accredited by SANAS.

17.5 Bidders who qualify as EMEs and QSEs must submit:

- Sworn affidavit signed by the EME or QSE representative and attested by a commissioner of oath.

17.6 The table below depicts the B-BBEE status level of contribution:

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

18 CONDITIONS OF THE CONTRACT

- 18.1 The appointed service providers will enter into a Service Level Agreement prior to commencement of the project.
- 18.2 The Department reserves the right to terminate the appointment of any part thereof, at any stage of completion should the Department decide not to proceed with the project.
- 18.3 Should the contract between the Department and the service provider be terminated by either party due to reasons not attributed to the service providers, the service providers will be remunerated for the appropriate portion of work completed.

19 FORMAT OF SUBMISSION OF PROPOSAL

19.1. Service providers are requested to submit five (5) copies of technical proposals plus the original.

19.2. Service providers are requested to index their proposals for easy reference.

20 PRE-BID MEETING / BRIEFING SESSION DETAILS-

A non-compulsory briefing session will be held on 15 September 2022, through Microsoft teams. companies will find the meeting link on DMRE website or e-tender portal kindly send email to Lucia.Nkhethoa@dmre.gov.za to receive the meeting link.

21. CLOSING DATE

Proposals must be submitted on or before **30 September 2022 @ 11:00** at Department of Minerals Resources and Energy, Travenna Campus, Building block 2C, Reception, 70 Meintjies Street, c/o Meintjies and Francis Baard Street, Sunnyside. Pretoria. **No late bids will be accepted.**

22. ENQUIRIES

22.1 All general enquiries relating to bid documents should be directed to:

Ms. Lucia Nkhethoa/ Ms. Nonhlanhla Zingwevu

Tel No: (012) 444 3778/3055

E-mail: Lucia.Nkhethoa@dmre.gov.za

22.2 Technical enquiries can be directed to:

Mr T. Mudau

Tel No: 012 444 3294

E-mail: godfrey.mudau@dmre.gov.za