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**BID DESCRIPTION: PROVISION OF INTEGRATED HUMAN  
RESOURCES (HR) SYSTEM (SAGE 300 OR SIMILAR)**

**BID NUMBER: OPFA/ICT/022022**

**ADVERT DATE: 13 SEPTEMBER 2022**

**CLOSING DATE: 7 OCTOBER 2022**

**CLOSING TIME: 11:00**

**Bidder name:**

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**Company registration number:**

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**CSD number:**

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## 1. INTRODUCTION

- 1.1. The Office of the Pension Funds Adjudicator (OPFA) was established in terms of section 30B of the Pension Funds Act No.24 of 1956 (ACT) with effect from 1 January 1998 to investigate and determine complaints lodged in terms of the ACT. The mission of the organisation is to resolve complaints in terms of the ACT. The OPFA has a staff compliment of about seventy (70) employees with potential to grow to eighty (80) employees.
- 1.2. In supporting the mission of the OPFA, Information and Communication Technology (ICT) has been identified as one of the key drivers in modernising and continuously improving the functioning of the organisation. This modernisation is aimed at improving service delivery to the stakeholders of the office and optimising internal operations.
- 1.3. The purpose of this bid is to appoint a suitable service provider to supply, implement and maintain an integrated Human Resources Management (HR) System (SAGE 300 or similar).

## 2. SCOPE

- 2.1. The scope of the project includes business process optimisation, data take-on, change management and training. The scope is divided into two distinct phases, namely the project phase and the maintenance & support phase.

The following is the scope of goods and services required for this bid:

### 2.2. **THE PROJECT PHASE (1 YEAR)**

#### 2.2.1. **Project management services**

2.2.1.1. A dedicated (full time) project manager to manage the project from the initiation to closure phase of the project (This excludes the maintenance and support phase). The project manager will act as a single point of contact for the duration of the project phase. If the project is deployed in phases the project manager will also manage the deployed services until all modules are implemented. The project manager will be responsible for amongst others

- 2.2.1.1.1. Overall management of the project including managing dependencies with other stakeholders (not just the service provider tasks).
- 2.2.1.1.2. Project governance in line with PMBOK methodology or any other best Project management practice methodology.
- 2.2.1.1.3. Project Documentation – produce project meeting minutes, weekly, monthly & quarterly status updates and any adhoc reports required by the OPFA governance structures. All the project and technical documentation must be signed off by the OPFA.
- 2.2.1.1.4. Ensure that all project and technical documentation is up to date for the duration of the project and updated as-designed and as-built documentation is handed over to

the support and maintenance team and the OPFA team at the end of the project phase.

- 2.2.1.1.5. Asset Information – ensure that all asset and configuration information is provided in the OPFA prescribed format and updated on the Cherwell (ITSM) system

## **2.2.2. Business process optimisation, solution design and architecture**

- 2.2.2.1. Review the current business processes (where documentation is not available, conduct workshops to elicit the required information).
- 2.2.2.2. propose optimised business process based on best practices and South African public sector regulations.
- 2.2.2.3. Document To-Be business processes before system configuration (this includes manual and system processes).
- 2.2.2.4. Document the functional design, detailed solution and technical architecture (design) based on best practice and the size of the organisation.

## **2.2.3. Software licenses management**

- 2.2.3.1. Provide on premise licenses for the number of users indicated in the table below. The licenses proposed should include both the server and user licenses. Provide licenses for the development, test, production and disaster recovery sites.

Module	Number of users
HR	80

- ***Note – the table above indicates the number of users and not the licenses required. The licenses required must be based on the license model of the proposed solution.***

2.2.3.2. Procure licenses from the Original Equipment Manufacturer (OEM) for the project period (one year) and maintenance and support/assurance (three years) phases.

2.2.3.3. All licenses must be procured in the name of the OPFA.

2.2.3.4. Provide license for the following environment.

2.2.3.4.1. Development

2.2.3.4.2. Testing

2.2.3.4.3. Production

2.2.3.4.4. Disaster Recovery

2.2.3.5. During the maintenance and support phase, the OPFA may procure additional licenses from any other service provider.

**2.2.4. Implement an integrated HRM system including management reports;**

2.2.4.1. Configure and customise all the modules required to meet the business requirements as per Annexure A functional requirement the HR Leave Management and Personnel data (end-to-end) and will be implemented first and should be completed in the first three months of the project.

2.2.4.2. Configure different sub-modules to seamlessly integrate and share data with each other.

2.2.4.3. Ensure that the solution is implemented successfully and operates in the development, test, production and disaster recovery site;

2.2.4.4. Ensure that, in case the production environment is unavailable due to a major incident or disaster, the solution works in the Disaster Recovery Site independently;

2.2.4.5. Ensure that the as-built technical documentation is updated before the project implementation sign off.

#### **2.2.5. Solution Testing**

2.2.5.1. Develop the testing plan and test cases for the entire solution. These documents must be approved by the OPFA;

2.2.5.2. Perform unit and integration testing;

2.2.5.3. Document all the test defects and resolutions and keep all the records electronically (e.g., excel);

2.2.5.4. Facilitate the user acceptance testing; and

2.2.5.5. Update all test documentation before project handover to maintenance and support.

#### **2.2.6. Data Take-on**

2.2.6.1. The OPFA is currently using manual processes for HR. The service provider must provide functionality to do the initial data load. The OPFA personnel will load its own data. The system must allow data to be captured by one person and be approved by another person before being accepted by the system as correct.

2.2.6.2. The system must have functionality to import data from spreadsheets; files and folders.

#### **2.2.7. Training Services**

2.2.7.1. Produce training material (including business processes and IT system); All training material must be submitted electronically.

2.2.7.2. Produce the entire system user manual; and

- 2.2.7.3. Train seven **(7) superusers** on all the system functionality and **end users** on the functionality that they will utilise (e.g. self-service);
- 2.2.7.4. Training material should be recorded electronically for future reuse.
- 2.2.7.5. Provide for remote online training and face-to-face training. The OPFA reserves the right to choose the mode of delivery based on business needs and lockdown regulations.
- 2.2.7.6. **N.B! The bidder must make a provision for training additional seven (7) superusers for as and when required e,g when superusers changes etc**

## **2.2.8. Deployment and Post Implementation Services**

2.2.8.1. Deploy the solution to the production and DR environment after successful testing in development and test environment.

2.2.8.2. Create user accounts and enable the users to work on the system.

2.2.8.3. Provide for post implementation support and maintenance services for all the modules that are implemented as part of the phased in approach until all the modules are fully implemented. Support and maintenance will only start once all the modules covering the entire scope of the project have been implemented and signed off. This service must be costed in as part of the project phase.

## **2.2.9. ICT Infrastructure**

2.2.9.1. The OPFA will provide all the on-premises ICT infrastructure (back-end and end users) including Microsoft base operating systems licenses for the project.

2.2.9.2. The bidder must specify the technical requirements for the servers, storage and Microsoft Hyper-V servers, etc during the planning phase of the project.



## **2.2.10. ICT Disaster Recovery**

- 2.2.10.1. Design the disaster recovery approach for the solution (production and disaster recovery site) based on best practice. *Note : The OPFA uses Microsoft Hyper V replication for all the virtual machines and Availability groups for the Exchange and SQL)*
- 2.2.10.2. Implement the designed solution and ensure that the data between the two sites is synchronised at a minimum of 15 minutes interval.
- 2.2.10.3. Participate in setting up the backup of the system using the OPFA Dell Networker solution.
- 2.2.10.4. Ensure that the solution can operate fully in the DR site within two hours of a major event of disaster including during simulated DR testing.
- 2.2.10.5. Create a step-by-step disaster recovery manual for starting up the solution in DR during the test or actual DR.
- 2.2.10.6. Create a step-by-step disaster recovery manual for the DR testing and execution of the proposed solution.
- 2.2.10.7. Create a step-by-step disaster recovery manual for starting up the solution in production after the test or actual DR.

## **2.2.11. Other ICT requirements**

2.2.11.1. Technologies - Proposed solution must work with the following technologies implemented in OPFA.

2.2.11.1.1. Windows Server 2019, SQL 2019, Windows 10 (current standards) or later

2.2.11.1.2. Microsoft Active Directory

2.2.11.1.3. Microsoft Hyper V

2.2.11.1.4. Dell Backup Networker solution

2.2.11.1.5. Exchange 2019 and Office 365

2.2.11.2. Commercially off the shelf Solution – The proposed solution must be a commercially of the shelf product requiring minimal (not exceeding 5%) customisation to meet the specified requirements.

2.2.11.3. Data Management – The proposed solution must provide a comprehensive data architecture that ensure that data integrity and data security is maintained.

2.2.11.4. System Administration – The proposed solution must cater for system administrator features and have the ability to provide reports on administrator activities.

2.2.11.5. Security – The proposed solution must comply with international recognised security standards (e.g., ISO 27001). It must have a security architecture that ensures that access to data is based on organisational roles, segregation of duties and has multi-user level access (e.g., capturer, supervisor, manager, system administrator, etc).

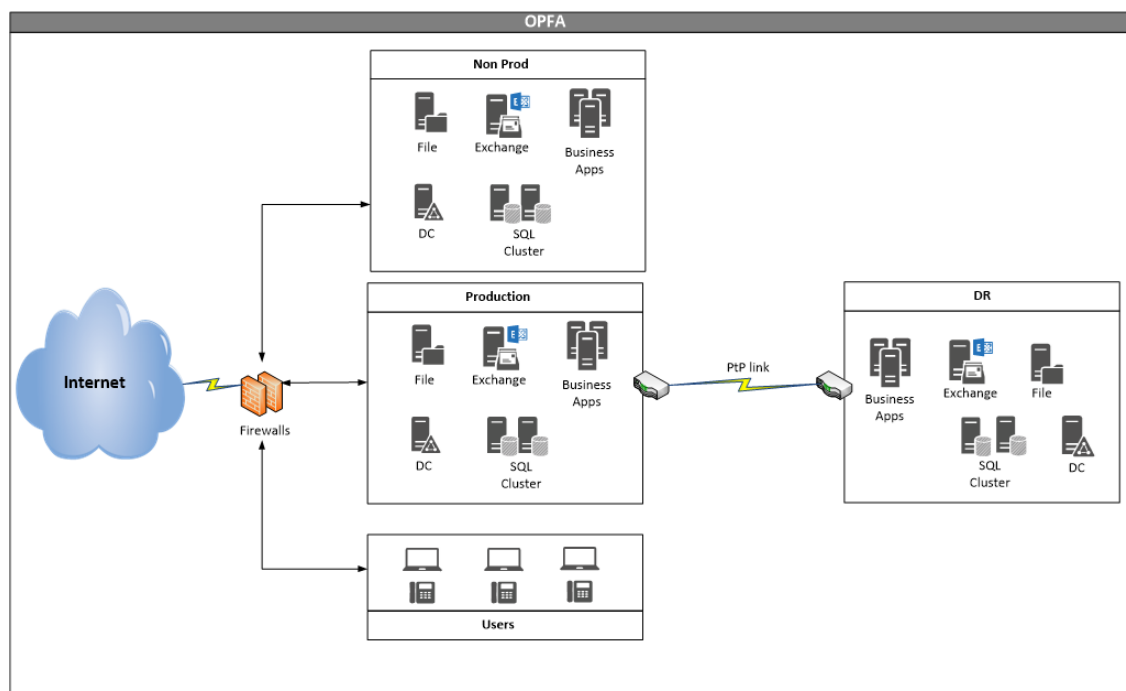
2.2.11.6. Content Management – The solution must have the ability to store content (document) in a structured format. The solution must include capabilities to manage the indexing, storage and

retrieval of the all-digital documents and content that is produced and uploaded in the solution. The solution must also be able to interface to scanning devices for the digitization of hard copy documents based on approved business processes.

2.2.11.7. POPIA Compliance – The solutions must comply with the provisions of Protection of Personal Information Act (POPIA).

2.2.11.8. Reporting – The solution must provide for standard off the shelf best practices reports and have the ability to produce custom reports when required.

## 2.2.12. Conceptual Diagram of the OPFA ICT Architecture



## 2.3. MAINTENANCE AND SUPPORT PHASE (3 YEARS)

### 2.3.1. Maintenance & Support Services

2.3.1.1. Provide technical support and maintenance of the entire integrated human resources management system including management reports for a period of three years. These services will have to be provided in line with the ITIL process. Below is the summary of the high-level requirements for the maintenance and support services

2.3.1.1.1. **Incidents and Problem Resolution** - This includes resolving all break fixes to restore the IT system in line with SLA. This also includes producing root cause analysis reports for major incidents and problems.

2.3.1.1.2. **Service Requests** – This includes attending to all request from the users (e.g., request for access, reports, etc)

- 2.3.1.1.3. **Corrective, Adaptive, Perfective & Preventative Maintenance Services.** This must be implemented at least once a month during the maintenance weekend. This includes installing the necessary patches and integration testing with other applications during the maintenance weekend.
- 2.3.1.1.4. **System Availability and Performance Monitoring** – This includes end to end system availability and monitoring of the IT system.
- 2.3.1.1.5. **System Upgrades** – This includes participation in the upgrade or update of the base Windows and database layers (Windows SQL, Adobe, Internet Explorer, etc). This also includes at least one major system upgrade once every 18 months for the proposed solution in this bid. This will be a major upgrade release by the OEM. The upgrade and timelines must be agreed with the OPFA before implementation.
- 2.3.1.1.6. **License Management** – This includes management of compliance with the system licenses and working with the OPFA to remediate any possible deviation from the agreement. In the event the licenses are over-provision by the bidder without prior warning to the OPFA, the cost will be for the bidder.
- 2.3.1.1.7. **Disaster Recovery and Tests** – This includes participating in the pre and actual disaster recovery test including updating of DR manuals. This also include restoring services at the DR site in case of a major incident or a disaster.
- 2.3.1.1.8. **Backup Services** – This includes ensuring that the IT systems is fully backed up utilising the current OPFA backup solution. This also includes testing the backups in line with the OPFA backup policy (minimum of three times a year).
- 2.3.1.1.9. **Document Upkeep** – This includes ensuring that all the documentation is kept up to date for the duration of contract including training material and recording.

- 2.3.1.1.10. **User Access Management** – Ensure that the user access is maintained and kept up to date at all times. This includes creating, maintaining and disabling users based on approved service request.
- 2.3.1.1.11. **Security Management** – Ensure that the system security is kept up to date at all times.
- 2.3.1.1.12. **Audit Management** – Participate in providing management information for internal and external audit findings in line with the auditors required timelines. This includes drafting management responses for the audit questions related to the system and the scope of the contract.
- 2.3.1.1.13. **Reporting** – Configuring all the required reports required for the optimal running of the OPFA business.
- 2.3.1.1.14. **Transition Out Services** – This is a once off service that will ensure that at the end of the contract, the service provider prepares all the documentation and fully participate in the transitioning-in of the new service provider. This exercise is expected to be conducted within a maximum period of three months.

## 2.3.2. Maintenance & Support Service Level Agreement (SLA)

2.3.2.1. The following minimum service standards and service level agreement, targets and penalties will be applicable during the maintenance and support phase of the contract.

SERVICE COMPONENT	SERVICE COMPONENT DESCRIPTION	Mean Time to Respond (from the time the call is logged)	Mean Time to Resolve (from the time the call is logged)	Target	Penalty
<b>Problem &amp; Incident Management</b>	Solution Availability	n/a	n/a	99% availability per month excluding planned downtimes	5% of monthly Maintenance and Support costs
	The resolution of End user calls	1 hour	<ul style="list-style-type: none"> <li>• Critical: (4) Hrs</li> <li>• High: (8) Hrs</li> <li>• Medium:(16) Hrs</li> <li>• Low: (24) Hrs</li> </ul>	95% of calls will be responded on within 1 Hour.  95% of calls to be resolved based on the allocated priority.	5% of monthly Maintenance and Support costs
	Reports of all users who have access and have been deactivated on all systems being supported including System Administrators per system.	n/a	n/a	Monthly Reports of Users per module by the 4th of the month	5% of monthly Maintenance and Support costs
	Quality of support services	n/a	n/a	95% of all incidents / service requests resolved per month that are not re-opened after resolution.	5% of monthly Maintenance and Support costs

SERVICE COMPONENT	SERVICE COMPONENT DESCRIPTION	Mean Time to Respond (from the time the call is logged)	Mean Time to Resolve (from the time the call is logged)	Target	Penalty
<b>Report Development &amp; Enhancement Services</b>	Development of new reports and/or Enhancement of existing reports that requires only solution configuration  MTTRespond: 2 Business Days  MT Develop (Time only): 5 Business Days	8 business hours	40 business hours	100% of requests issued.	10% of monthly Maintenance and Support costs
<b>Software Updates, Patching &amp; Change Management</b>	Patching of the solution or software update	n/a	Monthly as per the OPFA maintenance plan (performed on weekends)	100% participation	10% of monthly Maintenance and Support costs
	Change and Release Management (Incl. Roll back management)	n/a	n/a	100% of changes approved in line with the change and release process.	10% of monthly Maintenance and Support costs
<b>Disaster Recovery, Back -ups and Restoration</b>	100% Participation in Disaster Recovery (DR) activities	As per plan	In line with OPFA DR policy	100% of services restored, with solution fully functional.	10% of monthly Maintenance and Support resourcing costs
	Ensure Performing Backups as per the OPFA backup policy and schedules.		At least 3 back-up restorations and testing per annum.  Monthly reporting on backups done.	99% of backups, as per approved schedule, completed successfully. Reporting will be available on a monthly basis by 4 <sup>th</sup> of the month.	10% of monthly Maintenance and Support costs



SERVICE COMPONENT	SERVICE COMPONENT DESCRIPTION	Mean Time to Respond (from the time the call is logged)	Mean Time to Resolve (from the time the call is logged)	Target	Penalty
<b>Solution Document Upkeep</b>	Configuration Management Database (CMDB)- Update (e.g., Software Configuration)	n/a	2 Working days	100% CMDB updated within 5 working days of every service that requires a CMDB update.	10% of monthly Maintenance and Support resourcing costs
	Solution Documentation Upkeep Service	n/a	n/a	95% of all documents provided within the predefined timeframes	5% of monthly maintenance and support costs

2.3.2.2. A maximum of 20% penalty of the monthly maintenance and support fee will apply per month regardless of the cumulative number of SLA breached.

### **2.3.3. Maintenance & Support Services Payments/Invoicing**

2.3.3.1. The maintenance and support invoice services must be submitted monthly after delivery of the services.

2.3.3.2. The invoice must be preceded by the monthly report and performance against SLA agreements. This report will be reviewed by OPFA and discussed with the service provider.




2.3.3.3. The penalties, if applicable, will be applied as per the penalty section.

## **2.4. Continuous Improvement Services**

- 2.4.1.** The bidder must make a provision of 15% maximum of the total value of the contract for out-of-scope change requests. This provision will only be used if there are new business requirements that are not part of the original scope that will need to be delivered during the course of the contract (e.g., regulatory changes).
- 2.4.2.** Upon submission of the business change request by the OPFA, the bidder will prepare the statement of work for consideration and approval by the OPFA. Only after approval can the bidder implement the change.
- 2.4.3.** The bidder is not entitled to the total amount in this provision. The bidder can only bill for the actual work done and signed off by the OPFA.
- 2.4.4.** The OPFA reserves the right not to use this provision for the duration of the contract if there are no new business needs.

### 3. CONTRACT TIMELINES

- 3.1. The project is divided into two distinct phases, namely the project phase and the maintenance & support phase.

Function	Sub- Function	Project phase		Maintenance and support
		0-3 months	4- 12 months	13-48 months
Phase 1	Leave management and Personnel data module			
Phase 2	Other modules			
Phase 3	Maintenance and support			

- 3.2. The timelines above indicates that the project phase should be completed within 12 months. Due to its high priority of the leave function, the Leave Management and associated HR records management (for active users) should be implemented in the first 3 months of the project.
- 3.3. The bidder may propose an optimised timeline, where different functions can be implemented in parallel to complete the project earlier.
- 3.4. Payments will be based on achievement of milestones and not on elapsed time.
- 3.5. Payment will be made within 30 days of receiving a valid invoice with proof of signed off milestone deliverables during the project phase and signed off monthly reports during the maintenance and support phase.

## 4. PENALTIES

- 4.1. The bidder is expected to provide the project schedule as part of the response to this bid. This project schedule will be reviewed and updated once the OPFA has awarded the contract. The project plan will then be signed off by both the bidder and the OPFA representative(s).
- 4.2. Invoices will only be considered for approval once each milestone has been reached and the milestone report has been submitted and accepted by the OPFA.
- 4.3. If the bidder fails to deliver the goods or services in line with the agreed timelines, the OPFA reserves the right to deduct penalty amount as specified in this document, from the next invoice, irrespective of the service to which the penalty applies. The bidder will not accrue service credits for finalising milestones ahead of schedule; therefore, the bidder will not be able to offset the penalties with the service credits.
- 4.4. During the project phase, a penalty of 10% of the milestone will be levied for every two weeks delay in achieving a milestone as per the project plan. The penalty will be levied on a recurring basis (every two weeks) until the situation is remedied.
- 4.5. The service level standards and penalties for the maintenance and support phase of the contract are specified in the SLA portion of this document above.
- 4.6. No penalty will be imposed against the bidder in instances where agreed timelines are not met for reasons that fall outside the bidder's scope.
- 4.7. Imposing the penalty does not absolve the bidder from performing the task, if repetitive non-compliance continues the repetitive penalty will be imposed until the milestone is completed.

## 5. SPECIAL CONDITIONS

- 5.1. Bidders that fail to comply fully with this section of the document SHALL be disqualified.

5.1.1.	<b>ACCEPTANCE OF CONDITIONS IN ALL THE SECTIONS OF THIS BID DOCUMENT</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder confirms compliance with, and acceptance of all the content of this document and accepts that all its sections are contractually binding. In case of any conflict between the bidder response and this document during the evaluation, contracting and implementation phases, this bid document will take precedence.</p> <p>The bidder accepts that any amendment or changes to this bid document will result in automatic disqualification unless if agreed to in writing by the OPFA before bid closing date.</p>		
5.1.2.	<b>PRICING</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder confirms that the pricing provided in the response document is an all-inclusive price that takes into consideration all section of this document and all the price adjustments required for the duration of the contract.</p> <p>The bidder confirms that they have reviewed the specification and quantities and have consulted with all stakeholders (e.g., OEM) to ensure that the requirements of the OPFA will be met. Any other additional required goods or services that are not specified in the bid document but are absolutely required to make the solution function should be explained in the response (with reasons) and the pricing should be included in the cost model/pricing schedule (under line item “other”).</p> <p>Any omission will be for the bidder’s cost.</p>		

5.1.3.	<b>FIRM PRICING</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	The bidder accepts that the pricing is firm for the duration of the bidding, contracting period and the contract phase. The pricing of the bidder must also accommodate Rate of Exchange fluctuations. The OPFA will not pay for any ROE claims.		
5.1.4.	<b>WORKING HOURS AND OVERTIME COSTS</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder accepts that core working hours are as follows: Monday to Friday (excluding public holidays) 07:30 to 17:00.</p> <p>Due to the nature of the ICT services, the bidder accepts that, where required, services may be performed after hours or weekends at no additional cost to the OPFA (e.g. scheduled maintenance, patching, resolutions of major incidents, DR testing, etc.). No overtime for working outside office hours can be claimed by the bidder.</p>		
5.1.5.	<b>TRAVELLING, PARKING AND ACCOMODATION AND OVERTIME COSTS</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidders confirm that all travelling, parking and accommodation costs are included in their pricing and will not be charged separately. The OPFA will not accommodate any claims whatsoever for travelling, parking and accommodation.</p> <p>No overtime for working after hours to finish milestones can be claimed by the bidder.</p>		

5.1.6.	<b>SERVICE STANDARDS AND PENALTIES</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder accepts minimum service standards set out in this document including associated penalties.</p> <p>The bidder accept that these standards and penalties will not change at the contracting or contract execution phase.</p>		
5.1.7.	<b>LOCATIONS</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder shall be required to deliver the services to all the OPFA users and at the OPFA Data Centres.</p> <p>The bidder understands that sometimes some of the users work away from the office (e.g., home). The bidder confirms that they will be able support the users and the ICT devices in line with the SLA.</p> <p>The bidder accepts that all services will be performed remotely. The OPFA will not make physical space at its office available for the bidder resources unless if arrangements have been agreed to by the OPFA.</p> <p>The bidder accepts that were required, for practical purposes (e.g., data centre visits, conducting DR tests; dealing with major incidents, etc), the bidder resources will be required to work at the OPFA offices or data centres.</p>		
5.1.8.	<b>SCOPE GROWTH/REDUCTION</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	The bidder confirms that their costing includes a scope growth to a maximum of 10% at any time during the contract period. The bidder accepts that should the growth exceed 10%, the cost of the additional scope will be at the same terms and conditions as in this bid specifications and the bidder's response. The bidder accepts that if the scope		

	is reduced by more than 10%, the OPFA will renegotiate the contract terms and conditions.		
5.1.9.	<b>SOFTWARE LICENCES PROCUREMENT AND MANAGEMENT</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder accepts that when the bidder procures licences on behalf of the OPFA, such licences will be procured in the name of the OPFA and will be owned by the OPFA.</p> <p>The bidder accepts that during the execution of the contract, all licences and quantities will be managed proactively. If software licences are overprovisioned by the bidder, without having formally notified the OPFA, the bidder accepts that the cost for the overprovisioning of licenses will be borne by the bidder.</p>		
5.1.10.	<b>BIDDER QUESTIONS AND CUT OFF DATE</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	The bidder questions must be submitted in writing to the email address provided in this document. The bidder takes note of the cut-off date for the questions. The questions asked after the cut-off date shall not be replied to.		
5.1.11	<b>BID VALIDITY PERIOD</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	The bidder accepts that the bid proposal submitted will be valid for 120 days		



## 6. EVALUATION CRITERIA

6.1. The proposal will be evaluated in three stages

6.1.1. Stage 1- Compliance

6.1.2. Stage 2 – Functionality Evaluation

6.1.3. Stage 3– Pricing and Preference points

### 6.2. STAGE 1: COMPLIANCE

Where there is a requirement for a bidder to provide substantiation or evidence, the bidder shall provide same accordingly. The OPFA reserves the right to verify any information in the response with the bidder or any other sources (e.g., OEM, CSD, etc.). If the bidder does not comply fully with any mandatory requirement, it shall be regarded as mandatory non-performance/non-compliance and the bid SHALL be disqualified and will not be evaluated further (functional requirements).

### COMPLIANCE A

6	SCM COMPLIANCE	EVIDENCE TO BE PROVIDED	COMPLY YES/NO
6.2.1.2	Master Bid Document	Provided and bound	
6.2.1.3	Electronic copy (USB)	Same as the master bid document	
6.2.1.4	SBD 1-Invitation to Bid	Duly completed and signed	
6.2.1.5	CSD Registration	CSD registration number/Proof of CSD registration ( <i>compliance verification will be conducted on the system</i> )	
6.2.1.6	SBD 3.3-Pricing schedule	Duly completed	
6.2.1.7	SBD 4- Bidders Disclosure	Duly completed and signed	

6.2.1.8	SBD 6.1 Preference points claim form in terms of Preferential Procurement Regulation 2017	Duly completed and signed	
6.2.1.9	Submission by closing date and time	Tender register	

## COMPLIANCE B

6.2.1.	<b>BIDDER REFERENCES</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The OPFA reserves the right to verify any information with persons/organisation provided as references by the bidder.</p> <p>In the event that the OPFA cannot reach the person/organisation, the bidder will facilitate a process to reach the exact contact person/organisation provided in the bid within two days. If this cannot be achieved, the OPFA will not allocate scores to the bidder for references.</p>		
6.2.2.	<b>CERTIFICATION/PARTNERSHIP</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder must submit the letter from the OEM/OSM that they are accredited to supply, implement and maintain the proposed software</p> <p><b><i>Substantiation required: The bidder must submit the letter from the OEM/OSM confirming that they are accredited partners which can supply, implement and maintain the proposed software.</i></b></p>		

6.2.3.	<b>INTEGRATED SOLUTION</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	The bidder confirm that the proposed solution is integrated and during the implementation phase the solution will be configured to ensure that the system shares the data across different modules, as far as possible.		
6.2.4.	<b>COMMERCIALLY OFF THE SHELF SOLUTION IMPLEMENTED ON PREMISE.</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder confirms that the proposed software solution is commercially available off-the-shelf (COTS).</p> <p>The bidder confirm that they have costed all the licenses for development, testing, production and DR sites for the duration of the contract.</p> <p>The bidder accepts that an on-premise solution is required and that they will not propose a cloud solution. <b>The bidder accepts that all cloud-based solution proposals will be disqualified.</b></p>		
6.2.5.	<b>SOFTWARE LICENSES</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder shall submit the proposal that will explain the proposed software licensing model.</p> <p>The bidder shall review the number of users, the number of environments (development, testing, production and disaster recovery) and propose the software licenses that the OPFA requires to meet the specified functionality.</p> <p><b><i>Substantiation required:</i></b></p> <p><b><i>1. 1-2 pages explaining a licensing model of the proposed software. Any information provided that is beyond two pages will not be considered.</i></b></p>		

	<p><b>2. Table indicating all proposed licenses that will meet the OPFA functional requirements (this table must also include licenses for development, testing, production and DR environments).</b></p> <p><b>3. Detailed pricing for proposed licenses to be included in the response</b></p>		
6.2.6.	<b>PROJECT TIMELINES</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder shall submit proposed project schedule taking into consideration the OPFA expected delivery timelines as per the section above (Contract Timelines)</p> <p>The bidder confirms that the project schedule is realistic and will form the baseline of project delivery. The bidder accepts that any delays in the project will result in penalties incurred by the bidder. No service credits, in any form, will be accrued by the bidder for finishing the task/milestone or the project earlier.</p> <p><b><i>Substantiation required: The bidder must submit the milestones project schedule indicating how they will meet the OPFA proposed project timelines. The plan must only include the project phase (from issuing of PO to handing over the project to maintenance and support).</i></b></p>		
6.2.7.	<b>CONTINUOUS IMPROVEMENT SERVICES</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder shall provide costing for the continuous improvement services. The bidder agrees that they are not entitled to the entire allocation. Payments for actual service rendered and signed off will be effected on a prorated based on the approved Statement(s) Of Work.</p>		

6.2.8.	<b>FUNCTIONALITY – REFERENCING OF SUBSTANTIATION</b>	<b>COMPLY</b>	<b>DO NOT COMPLY</b>
	<p>The bidder shall in specific terms, clearly reference their substantiation in the functionality section of their bid response <b>[reference to schedule(s), section(s), page number(s)]</b>.</p> <p>The OPFA will not provide a score for a specific item should the bidder (i) not substantiate their response or (ii) accurately reference their response.</p>		

**6.3. STAGE 2: FUNCTIONALITY EVALUATION**

6.3.1. Only bids that have fully complied with Stage 1 will be evaluated in Stage 2.

6.3.2. Only bids that meet a minimum threshold of 70% in the functionality evaluation will proceed to stage 3 – Pricing and Preference points.

6.3.3. Bidders are required to accurately reference their response, the OPFA will not allocate the scores for the sections of the response which are not correctly referenced.

6.3.3.1.	Functional Requirements and Proposed System				25%																	
	<p>i. The bidder must provide summary of the proposed system and how it will meet the OPFA functional requirements.</p> <p>ii. The bidder must include a table that associates the business functionality (Annexure A) with the software module/functionality of the proposed system. The bidder must indicate if the module is commercially off the shelf and if not indicate if the module is fully integrated to the commercially off the shelf system. The information must be provided as per the table below. Example provided below.</p> <p><b><u>Please provide the response as per the format of the table below</u></b></p> <table><tr><th>Functionality</th><th>Software Module</th><th>COTS</th><th>Integrated</th></tr><tr><td>Leave Management</td><td>Module name (e.g., HR)</td><td>Yes</td><td>Yes</td></tr><tr><td>Bursary Management</td><td>Module name (e.g., HR)</td><td>No</td><td>Yes</td></tr><tr><td>Reporting</td><td>Module Name (e.g BI)</td><td>Yes</td><td>Yes</td></tr></table>			Functionality	Software Module	COTS	Integrated	Leave Management	Module name (e.g., HR)	Yes	Yes	Bursary Management	Module name (e.g., HR)	No	Yes	Reporting	Module Name (e.g BI)	Yes	Yes	1.	No information	
				Functionality	Software Module	COTS	Integrated															
				Leave Management	Module name (e.g., HR)	Yes	Yes															
				Bursary Management	Module name (e.g., HR)	No	Yes															
				Reporting	Module Name (e.g BI)	Yes	Yes															
	2.	Meet requirements 69% modules available as part of the COTS system (simple count)																				
3.	Meet requirements and 70-80% modules available as part of the COTS system (simple count)																					
4.	Meet requirements over 80-90% but not all modules available as part of the COTS system (simple count)																					
5.	Meet requirements and all modules available in the COTS solution (simple count)																					
The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.		YES	NO																			
Reference to schedule(s), Section(s), Page number(s)																						

6.3.3.2.	<b>Bidders Experience</b>						<b>25%</b>													
	<p>i. The bidder must have experience of implementing the ERP solutions with similar requirements as the OPFA. Experience per project must include implementation of the HRM functionality.</p> <p>ii. The project list must contain four projects where similar services were <u>implemented by the bidder</u>. The referenced projects should not be more than 10 years old.</p> <p>iii. The references can be that of any party involved in the bid (e.g., prime, subcontractor, JV, etc. ).</p> <p>iv. The bidder must include relevant reference letters with contact person for at least four (4) projects.</p>						1.	No information												
							2.	1 similar project implemented												
							3.	2 similar projects implemented												
							4.	3 similar projects implemented												
							5.	4 or more similar projects implemented												
	<table border="1"> <thead> <tr> <th>Name of Organisation</th> <th>Functionality Modules Implemented</th> <th>Sub modules</th> <th>Date project completed</th> <th>Private or Public</th> <th>Number of users</th> </tr> </thead> <tbody> <tr> <td rowspan="3">Company X</td> <td rowspan="3">HR</td> <td>Leave</td> <td>16 Dec 2020</td> <td rowspan="3">Public</td> <td rowspan="3">200</td> </tr> <tr> <td>Bursary</td> <td>16 Dec 2020</td> </tr> <tr> <td>Performance</td> <td>16 Dec 2020</td> </tr> </tbody> </table>		Name of Organisation	Functionality Modules Implemented	Sub modules	Date project completed	Private or Public	Number of users	Company X	HR	Leave	16 Dec 2020	Public	200	Bursary	16 Dec 2020	Performance	16 Dec 2020		
	Name of Organisation	Functionality Modules Implemented	Sub modules	Date project completed	Private or Public	Number of users														
	Company X	HR	Leave	16 Dec 2020	Public	200														
			Bursary	16 Dec 2020																
			Performance	16 Dec 2020																
The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.			YES	NO																
Reference to schedule(s), Section(s), Page number(s)																				



6.3.3.3.	Proposed project Implementation Approach (1 YEAR)			30%	
	<i>i. The bidder must provide a milestone project plan indicating when each module will be implemented.</i> <i>ii. The bidder must provide an approach that will be followed to determine the future business processes.</i> <i>iii. The bidder must provide a detailed change management approach.</i> <i>iv. The bidder must describe the training approach.</i> <i>v. The bidder must provide a high-level human resource plan that will be implemented during the project phase.</i> <i>vi. Data Migration Plan</i>	1.	No information		
		2.	1 or 3 – Requirements responded satisfactorily		
		3.	4 – Requirement responded satisfactorily		
		4.	5 Requirements responded satisfactorily, 3-4 excellently responded to.		
		5.	6 Requirements responded satisfactorily and showing excellent approach for all requirements.		
		The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.		YES	NO
	Reference to schedule(s), Section(s), Page number(s)				

6.3.3.4.	Maintenance and Support			20%	
	<i>i. The bidder must explain the approach that will be followed to meet the requirements as articulated in the maintenance and support phase.</i> <i>ii. The bidder must explain how they will ensure that the service level standards defined in the document are met.</i> <i>iii. The bidder must explain how the maintenance and support phase will be resources.</i>	1.	No information		
		2.	Response does not meet the requirements		
		3.	Response meets one of the requirements		
		4.	Response meets two of the requirements		
		5.	Response meets all the requirement		
The bidder declares that all relevant parts of the bid response required to answer this question has been correctly referenced below.		YES	NO		
Reference to schedule(s), Section(s), Page number(s)					

6.4. **STAGE 3: PRICE AND PREFERENCE POINTS**

- 6.4.1. The 80/20 preference point system shall be applicable to this bid, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represents the B-BBEE level status. Points will be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below.

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

## 7. COST MODEL/PRICING SCHEDULE (FIRM PRICING)

	HUMAN RESOURCES		
	DOCUMENT REFERENCE	PRICE EXCL VAT	PRICE INCL VAT
Project Management Services	2.2.1		
Business Process Optimisation, Solution Design and Architecture	2.2.2		
Software Licenses Management ( 1 year project )	2.2.3		
Software Licenses Management (3 years M&S/assurance)	2.2.3		
Implementing of the Integrated solution including management reports	2.2.4, 2.2.9, 2.2.10, 2,2,11		
Solution Testing	2.2.5		
Data Take-On	2.2.6		
Training Services	2.2.7		
Provision for additional training	2.2.7.6		
Deployment and Post Implementation Services	2.2.8		
Maintenance and Support (3-year period) - Will be paid per month)	2.3		
Continuous improvements	2.4		
Other (specify)			
SUB TOTAL HR			
		PRICE EXCL VAT	PRICE INCL VAT
TOTAL			

## 8. LOCATIONS OF THE DATA CENTRES AND OPFA OFFICES

DEVELOPMENT	PRODUCTION	DISASTER RECOVERY
<i>Riverwalk Office Park Block B, FSCA data centre, Pretoria</i>	<i>Riverwalk Office Park Block B, FSCA data centre, Pretoria</i>	<i>Midrand Dimension Data data centre Waterfall</i>

## 9. GENERAL UNDERTAKINGS

The following shall be applicable to this request for proposals:

- 9.1. The OPFA will not accept the bid, if the OPFA is satisfied that any person (including an employee, partner, director or shareholder of the tenderer or a person acting on behalf of or with the knowledge of the tenderer), firm or company:
  - 9.1.1. Is restricted from doing business with the state or employed by the state
  - 9.1.2. Has in any manner been involved in a corrupt act in relation or other gift or remuneration to any officer or employee of the OPFA in connection with obtaining or executing a contract;
  - 9.1.3. Has acted in bad faith, in a fraudulent manner or committed an offence in obtaining or executing a contract;
  - 9.1.4. Has in any manner influenced or attempted to influence the awarding of OPFA's bid;
  - 9.1.5. Has, when advised that their tender has been accepted, given notice of his inability to execute or sign the contract;
  - 9.1.6. Has engaged in any anti-competitive behaviour, including having entered into any agreement or arrangement, whether legally binding or not, with any other person, firm or company to refrain from tendering for this contract, or relating to the tender price to be submitted by either party.
  - 9.1.7. Has disclosed to any other person, any information relating to this bid, except where disclosure, in confidence, was necessary to obtain quotations required for the preparation of the tender or required by law;
  - 9.1.8. The OPFA may, in addition to any other legal recourse which it may have, cancel the contract between the OPFA and such a person and/or resolve that no tender from such a person will be considered for a specified period.

- 9.2. The award of this tender may be subjected to price negotiation with the highest point scorer in terms of the preferential procurement regulation if the price offered is considered not to be market related.

## 10. TENDER ENQUIRIES

- 10.1. Any questions regarding this tender shall be submitted in writing to the official mentioned in the Tender Notice, enquiries must be sent to [tenders@pfa.org.za](mailto:tenders@pfa.org.za) by not later than **28 September 2022** to allow the OPFA opportunity to respond to enquiries. Enquiries received after this date will not be responded to.

## 11. TENDER BRIEFING

- 11.1. There will be a non-compulsory briefing session.

**Date: 26 September**

**Time: 11H00 – 12H00**

**Venue: Virtually (MS Team)**

**Link:** [https://teams.microsoft.com/l/meetup-](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YmQzM2YwNWltNTNmOS00MGI2LWE5MmQtNzQyZWNiNDU0NTRh%40thread.v2/0?context=%7b%22Tid%22%3a%229999d847-6d91-467b-a248-5dce763ea690%22%2c%22Oid%22%3a%22370bc4e7-074e-47e6-9d45-4f4c21575aa3%22%7d)

[join/19%3ameeting\\_YmQzM2YwNWltNTNmOS00MGI2LWE5MmQtNzQyZWNiNDU0NTRh%40thread.v2/0?context=%7b%22Tid%22%3a%229999d847-6d91-467b-a248-5dce763ea690%22%2c%22Oid%22%3a%22370bc4e7-074e-47e6-9d45-4f4c21575aa3%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YmQzM2YwNWltNTNmOS00MGI2LWE5MmQtNzQyZWNiNDU0NTRh%40thread.v2/0?context=%7b%22Tid%22%3a%229999d847-6d91-467b-a248-5dce763ea690%22%2c%22Oid%22%3a%22370bc4e7-074e-47e6-9d45-4f4c21575aa3%22%7d)

## 12. TENDER SUBMISSIONS

- 12.1. Completed documents with supporting annexures shall be packaged, sealed, clearly marked and submitted on or before the closing date and time.

**Closing date: 7 October 2022**

**Time: 11H00**

**Tender No: OPFA/ICT/022022**

**Bids must be hand delivered to the OPFA's address as follows**

41 Matroosberg Road  
Riverwalk Office Park  
Block A, Fourth Floor  
Ashlea Gardens  
Pretoria

- 12.2. Late submissions and bids submitted by means of e-mail, telegram, telex facsimile, electronic or similar means shall not be considered.

**13. TENDER SUBMISSION FORMAT**

- 13.1. The OPFA requires one original copy of the completed bid document and supporting documents (hard copy) and one soft copy in a memory stick or compact disc, bidders must ensure the soft copy is readable. All submission must be made as per paragraph 12 above.

**14. REGISTRATION WITH CENTRAL SUPPLIER DATABASE**

- 14.1. The OPFA will not award any bid to a supplier who is not registered as a prospective supplier on the Central Supplier Database (CSD) as required in terms of National Treasury SCM Instruction Note 4A of 2016/2017.

**15. BID VALIDITY PERIOD**

- 15.1. Bid validity period will be hundred & twenty (120) days from closing of the tender.



## 16.ADDITIONAL INFORMATION REQUIRED

The following additional information is required:

**A sworn declaration and/or proof that a bidder:**

- Is not participating and contributing to any retirement fund for its employees
- Is participating and contributing to a pension or provident fund and contributions are not in arrears. As proof, a confirmation of their contribution status from their retirement fund administrator must be submitted together with the declaration.

## **17. PROTECTION OF PERSONAL INFORMATION**

- 17.1. “Personal Information” means personal information as defined in the Protection of Personal Information Act, 2013 (Act No. 4 of 2013), as amended from time to time.
- 17.2. All information collected and submitted by the bidders will be used by the OPFA for the evaluation and adjudication of this bid to determine the bidders’ suitability and compliance to deliver the goods/services required. By submitting this bid the bidder gives consent for the OPFA to process the personal information provided by the bidder accordingly.
- 17.3. “Personal Information” (PI) shall mean the race, gender, sex, pregnancy, marital status, national or ethnic origin, colour, sexual orientation, age, physical or mental health, disability, religion, conscience, belief, culture, language and birth of a person; information relating to the education or the medical, financial, criminal or employment history of the person; any identifying number, symbol, email address, physical address, telephone number, location information, online identifier or other particular assignment to the person; the biometric information of the person; the personal opinions, views or preferences of the person; correspondence sent by the person that is implicitly or explicitly of a private or confidential nature or further correspondence that would reveal the contents of the original correspondence; the views or opinions of another individual about the person whether the information is recorded electronically or otherwise.
- 17.4. The parties acknowledge that for the purposes of this bid and agreement the parties may come into contact with, or have access to PI and other information that may be classified, or deemed as private or confidential and for which the other party is responsible. Such PI may also be deemed or considered as private and confidential as it relates to any third party who may be directly or indirectly associated with this agreement. Further, it is acknowledged and agreed by the parties that they have the necessary consent to share or disclose the PI and that the information may have value.

- 17.5. The parties agree that they will at all times comply with POPIA's Regulations and Codes of Conduct and that it shall only collect, use and process PI it comes into contact with pursuant to this agreement in a lawful manner, and only to the extent required to execute the services, or to provide the goods and to perform their respective obligations in terms of this agreement.
- 17.6. The parties agree that it shall put in place, and at all times maintain, appropriate physical, technological, and contractual security measures to ensure the protection and confidentiality of PI that it, or its employees, its contractors or other authorised individuals comes into contact with pursuant to this agreement.
- 17.7. Notify each other immediately where it has reasonable grounds to believe that the Personal Information in respect of this agreement, which has been provided to it including any Personal Information which it has processed, has been lost, destroyed, or accessed or acquired by any unauthorised person.
- 17.8. Unless so required by law, the parties agree that it shall not disclose any PI as defined in POPIA to any third party without the prior written consent of the other party, and notwithstanding anything to the contrary contained herein, shall any party in no manner whatsoever transfer any PI out of the Republic of South Africa.

## **ANNEXURE A: SYSTEM FUNCTIONAL REQUIREMENTS**

<b>MODULE</b>	<b>SUB MODULE</b>	<b>BUSINESS REQUIREMENT</b>
<b>Employee Self Service</b>	<b>Employee</b>	Apply for leave (e.g., annual, sick, family responsibility, etc) and check leave balances.
		Submit and manage claims (e.g., Cell phone, compensation) and timesheets.
		Manage personal details like bank accounts and next-of-kin information.
		View current and previous payslips and tax certificates as well as printing selected reports.
		Capture performance agreements, half, and full year reviews and self-assessments.
		Capture personal development plan (PDP).
		Apply for training courses and bursaries.
		Upload HR and payroll related supporting documents (e.g., qualifications, proof of residence).
		Download selected company documents (e.g., payslips, performance assessments, etc).
		Create workflow for employee terminations.
		Apply for other employee benefits (e.g., remote working).
	<b>Manager</b>	Approve leave and check leave balances for the team
		Approve transactions such as claims (e.g., Cell phone, compensation) and timesheets
		Submit job requisitions & submit and manage staff requisitions.
		Capture performance agreements, half, and full year reviews and self-assessments and PDP's
		Approve training and bursary applications and view progress reports
		View the leave of all their team on a consolidated team calendar
		Generate and print reports for the team (e.g., leave)

MODULE	SUB MODULE	BUSINESS REQUIREMENT
Human Resources Management	Organisation Structure, Jobs, and Positions	Capture the organisational structure and enable the functionality to update it when required.
		Capture the portfolio/business units.
		Create job families with associated positions.
		Link positions/job families to different kind of data like job grade, job title, pay scale, performance areas, etc.
		Allocate different positions within the organisational structure and allow for updating people associated with various positions (e.g., if a person changes units, update manager accordingly).
		Create job profiles for each position and/or job families.
		Capture and associate each position on the structure with competency requirements, KPAs and KPIs.
		Provide complete control and visibility of each job/position specification and requirements within the organisation.
		Provide a function for organizational design and review to accommodate changes on the existing structure.
	Job Costing and Budgeting	Create a full comprehensive budget for all filled and vacant positions.
		Provide ability to calculate budget for specified percentage increase.
		Provide the ability to export and import the budget figures to other systems (e.g., excel, finance system).
		Implement the ability to forecast for a specific period and produce periodic variance reports.
	Personnel and Records Management	Register and maintain and terminate all employee's information across the organisation
		Register and maintain allocated benefits per employee.
		Create and maintain all employee information records in a single place.
		Provide a single view of the employee ( <b>electronic employee file</b> – e.g., personal information, salaries, disciplinary actions, qualifications, performance).
		Ensure that the system records all employee transaction and supporting documentation.
		Enable the capability to import and export data from MS Excel (e.g., employee records).

MODULE	SUB MODULE	BUSINESS REQUIREMENT
	<b>Learning and Skills development</b>	Provide the ability to conduct skills audit.
		Create the ability to capture training requests and approvals.
		Capture training plans, schedule training and retrieve training reports.
		Generate training requests based on performance issues (Personal Development Plans)
		Generate training reports for compliance with Skills Development Act.
		Generate Workplace Skills Plan (WSP) and Annual Training Plan (ATR)
		Capture and report on training budget and variances.
		Capture and report employee qualification as per SAQA framework.
	<b>Employment Equity Management</b>	Capture and maintain employment equity goals and targets.
		Ensure monitoring and reporting of employment equity targets during promotions and appointment
		Produce management equity targets achievements and variances
		Produce employment equity reports (Department of Labour).

MODULE	SUB MODULE	BUSINESS REQUIREMENT
	<b>Performance Management</b>	Capture the OPFA performance agreement templates to the system.
		Provide the ability for employees to capture the performance agreements (bi-annual or annual) and personal developments plans.
		Provide the ability for employees to perform self-assessments (bi-annual or annual) upload portfolio of evidence, submit to line management, review scores from manager, accept the outcomes, etc.
		Provide for a workflow for dispute resolution for performance management.
		Provide the ability for manager to review and approve/amend or decline the performance agreements and/or personal developments plans.
		Provide the ability for manager to perform assessment and approve or amend the self-assessment.
		Provide the ability to do 360 performance reviews.
		The system must auto calculate the final score by aggregating scores for both bi-annual reviews.
		The system must allow for the workflow for dispute management process which includes the employee, manager, and HR, this process must be supported by email notifications.
		The system must allow for the workflow for moderation process.
		Provide for ability for creation of performance report per employee.
		Provide the ability for executive and senior managers to view performance of employees within their area of responsibility as per the organogram.
		Based on predefined dates the system must initiate the capturing of agreements and assessments.

	<b>Recruitment and Termination</b>	Provide the managers the ability to initiate a recruitment process for a position.
		Place a job advertisement
		Pre-filter the career profile of each candidate, consolidate data and track placements.
		Search the candidate database
		Handle job advertisement responses
		Shortlist candidates for interviews
		Send an invitation to candidates and panel members for an interview
		Process status update for shortlisted candidates
		Send regret letters to unsuccessful candidates
		Provide the ability for candidates to accept or decline the offer of employment.
		Generate related reports
		Archive the job opening



<b>Payroll Management</b>	<b>Salaries and benefits</b>	Create hierarchical levels, employees, pay period configurations and pay runs.
		Create the ability to structure different salary packages.
		Capture salaries information of employees, overtime, bonuses, 13th cheque.
		Provide the ability for submitting and approving a claim for compensation
		Create Earning, Deduction, Company Contribution, Fringe Benefit or Provision definitions.
		Do net-up calculations of salaries and wages.
		Enable creation of payslip structures for individuals or groups (with similar payslips structures)
		Enable the ability to produce payslip per month that can be downloaded from the system on request by the employee.
		Allow multiple payslips per pay period which can be consolidated into a single printable payslip.
		Provide the ability to extract reports per pay period.
		Enable standard payroll reports and the ability to generate other payroll reports.
	<b>General Ledger</b>	Create ledger accounts for the payroll journals that can be exported to other systems.
		Utilise the API to populate the Accounting software.

	<b>Leave Management System</b>	Create leave entitlements as per the conditions of employees for each employee (normal, sick, family responsibility, etc) based on statutory requirements and OPFA policies and practice notes.
		Provide for the ability for employees to apply for leave and direct line managers to approve.
		Provide the ability to delegate the managers functions to another employee when taking leave.
		Provide a history of leave taken (all leave types).
		Calculate leave balances (all leave types)
		Provide financial accrual and liability of leave days.
		Leave report by section/cost centre.
		Provide overtime management & links to payroll.
		Leave function should be configurable to meet OPFA needs.
		Calculate the expiring leave and notifying the users automatically via email.
		Provide the ability to use different colours for each leave type.
		Provide for reporting per leave type, per team, organisation, etc.
<b>Reporting</b>		Enable all standard reports (HR and Payroll)
		Produce reports regarding all processes associated with HR.
		Provide the ability to create and store customised reports for future use.
		Create statutory reports for HRM and payroll functions (e.g. payroll, skills development, employment equity, etc).
		Facilitate the viewing of HR related data in a graphical format
		Provide standard graphs for age analysis, years of service, head count and salary by grade.
		Provide a report scheduling capability (delivered on specific times and to specific recipients) as per the report requirement specification document or standard HR practice.

**ANNEXURE B: HIGH LEVEL PROJECT PLAN**

#	Activities	Responsibility	Completion date
1	Advertising and publishing the tender	OPFA	13 September 2022
2	Non-compulsory briefing session	OPFA and prospective bidders	26 September 2022
3	Last day for submission of email enquiries	Prospective bidders	28 September 2022
4	Publishing of responses to enquiries received	OPFA	30 September 2022
5	Closing of the Bid	OPFA	7 October 2022
6	Bid evaluation	OPFA	21 October 2022
7	Adjudication and appointment of the service provider and contract	OPFA	31 October 2022
8	Appointment of Service Provider and onboarding	SCM Unit	01 November 2022
9	Project implementation and testing: Phase 1	OPFA and appointed service provider	31 March 2023
10	Project implementation and testing: Phase 2	OPFA and appointed service provider	30 November 2023

## **STANDARD BIDDING DOCUMENTS**

### **SBD1: PART A: INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE OFFICE OF THE PENSION FUNDS ADJUDICATOR</b>					
BID NUMBER:	OPFA/ICT/022022	CLOSING DATE:	7 October 2022	CLOSING TIME:	11:00
DESCRIPTION	PROVISION OF INTEGRATED HUMAN RESOURCES (HR) SYSTEM - SAGE 300 OR SIMILAR				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
41 MATROOSBERG ROAD					
RIVERWALK OFFICE PARK, BLOCK A, 4 <sup>TH</sup> FLOOR					
ASHLEA GARDENS; PRETORIA					
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>			<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>		
CONTACT PERSON	Sthembiso Shabalala	CONTACT PERSON	Magadi Tshitannye		
TELEPHONE NUMBER	012 748 4048	TELEPHONE NUMBER	012 748 4048		
FACSIMILE NUMBER		FACSIMILE NUMBER			
E-MAIL ADDRESS	<a href="mailto:tenders@pfa.org.za">tenders@pfa.org.za</a>	E-MAIL ADDRESS	<a href="mailto:tenders@pfa.org.za">tenders@pfa.org.za</a>		
<b>SUPPLIER INFORMATION</b>					
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	
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					

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 THE QUESTIONNAIRE BELOW ]
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### QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO
- DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
- DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
- DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO
- IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

**IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

## PART B: TERMS AND CONDITIONS FOR BIDDING

### 1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

### 2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED
- 2.7 . NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

The general conditions of Contract are available here and must be submitted as part of the submission

<http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/General%20Conditions%20of%20Contract-%20Inclusion%20of%20par%2034%20CIBD.pdf>

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

**SIGNATURE OF BIDDER:**

.....

**CAPACITY UNDER WHICH THIS BID IS SIGNED:**

.....

(Proof of authority must be submitted e.g. company resolution)

**DATE:**

## BIDDER'S DISCLOSURE: SBD 4

### 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<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

2.2.1 If so, furnish particulars:

.....  
.....

---

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

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

- 2.3.1 If so, furnish particulars:

.....  
.....

### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National

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<sup>2</sup> 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.



Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I certify that the information furnished in paragraphs 1, 2 and 3 above is correct.

**I accept that the state may reject the bid or act against me in terms of Paragraph 6 of PFMA SCM Instruction 03 of 2021/22 on Preventing and combating abuse in the Supply Chain Management system should this declaration prove to be false.**

.....  
Signature Date

.....  
Position Name of bidder

## **SBD 6.1**

### **PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017**

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

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#### **1. GENERAL CONDITIONS**

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

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

b) Either the 80/20 or 90/10 preference point system will be applicable to this tender  
(*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	<b>POINTS</b>
<b>PRICE</b>	80
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	20
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor

together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

- 1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

## POINTS AWARDED FOR PRICE

### 2.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

**80/20**

**or**

**90/10**

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of lowest acceptable bid

## 3. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 3.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

#### 4. BID DECLARATION

- 4.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

#### 5. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 5.1 B-BBEE Status Level of Contributor: . = .....(maximum of 10 or 20 points)
- (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

#### 6. SUB-CONTRACTING

- 6.1 Will any portion of the contract be sub-contracted?

**(Tick applicable box)**

YES		NO	
-----	--	----	--

- 6.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

**(Tick applicable box)**

YES		NO	
-----	--	----	--

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		

Any EME		
Any QSE		

**7. DECLARATION WITH REGARD TO COMPANY/FIRM**

7.1 Name of  
company/firm:.....

7.2 VAT registration  
number:.....

7.3 Company registration  
number:.....

**7.4 TYPE OF COMPANY/ FIRM**

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

**7.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

.....  
.....  
.....  
.....  
.....

**7.6 COMPANY CLASSIFICATION**

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

7.7 Total number of years the company/firm has been in business:.....

7.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of

contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we 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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser 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 by the National Treasury 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.

**WITNESSES**

- 1. ....
- 2. ....

**SIGNATURE(S) OF BIDDERS(S)**

DATE: .....

ADDRESS .....

.....

.....