

REQUEST FOR PROPOSALS (RFP) MANAGEMENT INFORMATION SYSTEM (MIS SOLUTION) REF NO: GEP RFP-08-2025-MIS

MEETING DETAILS:

- **PURPOSE: COMPULSORY BRIEFING SESSION**
- **TYPE: PHYSICAL**
- **DATE: 10 APRIL 2025**
- **TIME: 11:00 AM TO 12:00 PM**
- **124 Main Street, Marshalltown, Johannesburg 10th Floor**

QUERIES ARE DUE ON THE 09 APRIL 2025 FOR FINALISATION WITH Q AND A SESSION.

RFP CLOSING DATE: 22 APRIL 2025, 11 AM

Submissions: Ground Floor, 124 Main Street, Marshalltown, Johannesburg

Validity Period: 90 days

YOU ARE HEREBY INVITED TO SUBMIT PROPOSALS FOR THE REQUIREMENTS OF: APPOINTMENT OF SERVICE PROVIDER FOR THE PROVISION OF AN MIS SOLUTION

RFP REFERENCE:	GEP RFP-08-2025-MIS
CLOSING DATE AND TIME:	22th APRIL 2025 at (11:00) am
RFQ VALIDITY PERIOD	90 days (Commencing from the RFP closing date)
DESCRIPTION	<p>Specification Description:</p> <p>NB: Kindly refer to the Terms of reference for complete requirements</p> <p>The procurement of the Management information system (MIS). The MIS will enhance GEP's customer experience and streamline processes across customer interactions, application tracking, and reporting. It should integrate all key components to enable efficient customer support, application management, and end-to-end automation of GEP's primary processes.</p>
ADD. FOR SUBMISSION	Ground Floor, 124 Main Street, Marshalltown, Johannesburg
ENQUIRY	scm@gep.co.za

Name of Service Provider:
CSD MA number:
Signature:
Date of submission of quotation:

Notes:

- 1. Bidders must put Name of the bidder, CSD MA number, sign and put submission date on RFP above;**
- 2. Complete supporting SBD documents and submit required with their response and BEE certificate / Sworn Affidavit signed by Commissioner of Oath/equivalent.**
- 3. Only bidders registered on the Central Supplier Database (CSD) will be considered for evaluation.**
- 4. All proposals received after closing time and date will not be considered.**

<p>BIDDER NAME:.....</p> <p>REGISTRATION NUMBER:.....</p> <p>ADDRESS:.....</p> <p>CONTACT PERSON:.....</p> <p>TEL:.....</p>
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TERMS AND CONDITIONS OF REQUEST FOR PROPOSALS (RFP)

1. GEP standard conditions of purchase shall apply.
2. GEP reserves the right not to procure the goods and/or services.
3. Late and incomplete submissions will not be accepted.
4. Any bidder who has reasons to believe that the RFP specification is based on a specific brand must inform the GEP before RFP closing date.
5. Bidders are required to submit BBBEE Certificate or SWORN Affidavit
6. It is the responsibility of the bidder to ensure that GEP is in possession of the bidder's valid BBBEE. The onus is on the bidder to ensure that the GEP receives a valid BBBEE as soon as the validity of the said certificate expires.
7. No services must be rendered or goods delivered before an official GEP Purchase Order form has been received, except in an emergency situation.
8. This RFP will be evaluated in terms of the 80/20 system prescribed by the Preferential Procurement Regulations, 2022.
9. Bidders are required to complete all the Annexures
10. Bidders, where applicable, are required to attach all relevant qualifications, experience in the public sector and references.
11. Bidders are required to sign each page of the bid document
12. The GOVERNMENT PROCUREMENT GENERAL CONDITIONS OF CONTRACT shall apply. :
<https://www.treasury.gov.za/divisions/ocpo/sc/generalconditions/general%20conditions%20of%20contract.pdf>
13. GEP reserves the right to negotiate with suppliers

ANNEXURE A

I, the undersigned (NAME).....certify that :

- i. I have read and understood the conditions of this RFP.
- ii. I have supplied the required information and the information submitted as part of this RFP is true and correct.

ANNEXURE B: PART A**INVITATION TO BID****YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)**

BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					

BID QUERIES TO BE SENT TO scm@gep.co.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Koketso Moeng	CONTACT PERSON	Nomonde Zulu/Jonas Morumudi
TELEPHONE NUMBER	011 085 2026	TELEPHONE NUMBER	011 085 2002
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	kmoeng@gep.co.za	E-MAIL ADDRESS	nzulu@gep.co.za/jmorumudi@gep.co.za

SUPPLIER INFORMATION

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.	

PART B**TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION: 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT EMAIL ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT. 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS. 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS. 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA . 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID. 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER. 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED. 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

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

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO.:

CLOSING TIME 11:00 CLOSING DATE.....

OFFER TO BE VALID FOR90.....DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)	
1.	The accompanying information must be used for the formulation of proposals.		
2.	Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.	R.....	
3.	PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)		
4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	.....	R.....	--- days
	.....	R.....	--- days
	.....	R.....	--- days
	.....	R.....	---days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....
TOTAL: R.....			

** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	R.....
-----	R.....
-----	R.....
-----	R.....
TOTAL: R.....			

6. Period required for commencement with project after acceptance of bid.....

7. Estimated man-days for completion of project.....

8. Are the rates quoted firm for the full period of contract?
*YES/NO

9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....

.....

.....

.....

***[DELETE IF NOT APPLICABLE]**

Any enquiries regarding bidding procedures may be directed to the –

(INSERT NAME AND ADDRESS OF DEPARTMENT/ENTITY)

Tel:

Or for technical information –

(INSERT NAME OF CONTACT PERSON)

Tel:

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:

 - 2.2 Identity
 Number:.....

 - 2.3 Position occupied in the Company (director, trustee, shareholder², member):

 - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:

 - 2.5 Tax Reference Number:

 - 2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹“State” means –

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

²“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

.....

Name of state institution at which you or the person connected to the bidder is employed:

.....

Position occupied in the state institution:

.....

Any other particulars:

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?

YES / NO

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

YES/NO

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

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

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Number	Income Reference	State Employee Number / Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

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

i accept that the state may reject the bid or act against me should this declaration prove to be false.

.....
Signature Date

.....
Position Name of bidder

.....
Position Name of bidder

ANNEXURE D: SBD 6.1

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

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

1.2 To be completed by the organ of state

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

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

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{\min} = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) any other invitation for tender, that either the 80/20 or 90/10 preference points system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is inapplicable, corresponding points must also be indicated as such.)

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Bidder must also submit the following Proof of evidence to claim the allocated points: Youth Ownership – certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy Woman Ownership – certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy Ownership by People with Disability – copy of Medical Certificate that is stamped by a medical practitioner NOTE: Submitted information will be verified through various platforms.		
Women (requirement is 51 %+ ownership)	12	
Youth (requirement is 51 %+ ownership)	4	
People with disabilities (requirement is 51 %+ ownership)	4	

DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.3. Name of company/firm.....
- 4.4. Company registration number:
- 4.5. TYPE OF COMPANY/ FIRM
- Partnership/Joint Venture / Consortium
 - One-person business/sole propriety

- Close corporation
 - Public Company
 - Personal Liability Company
 - (Pty) Limited
 - Non-Profit Company
 - State Owned Company
- [CIRCLE APPLICABLE]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audialteram partem* (hear the other side) rule has been applied; and
 - (e) Forward the matter for criminal prosecution, if deemed necessary.
 - (f) forward the matter for criminal prosecution, if deemed necessary.

<p>.....</p> <p>SIGNATURE(S) OF TENDERER(S)</p>
<p>SURNAME AND NAME:</p>
<p>DATE:</p>
<p>ADDRESS:</p>

Consent form in terms of section 11 of the Protection of Personal Information Act No 4 of 2013 (POPIA)

In order for the Gauteng Enterprise Propeller (GEP) to consider the bidder's response to the RFQ / RFP to become a service provider of the GEP, it will be necessary for the GEP to process certain personal information which the service provider may share with GEP for the purpose of the RFQ / RFP, including personal information, which may include special personal information (all hereafter referred to as "Personal Information")

The GEP will process the Service Provider's Personal Information in accordance with the GEP Privacy Policy.

Access to your Personal Information and purpose specification

Personal Information will be processed by GEP for purposes of assessing the service provider's submission in relation to the RFQ / RFP i.e. the purposes of assessing current services required by the GEP. We may also share the service provider's Personal Information with third parties, both within the Republic of South Africa and in other jurisdictions, including to carry out verification, background checks and Know Your Customer obligations in terms of the Financial Intelligence Centre Act, No. 38 of 2001 ("FICA"). In this regard, the service provider acknowledges that GEP's authorised verification agent(s) and service providers will access Personal Information and conduct background screening.

Consent

By [ticking/clicking] "Yes" and signing below, you agree and voluntarily consent to the GEP's processing of the service provider's Personal Information for the purposes of evaluating its RFQ / RFP submission, including to confirm and verify any information provided in the submission and service provider gives GEP permission to do so. The service provider understands that it is free to withdraw its consent on written notice to GEP and the service provider agrees that the Personal Information may be disclosed by the GEP to third parties, including GEP's affiliates, service providers and associates (some of which may be located outside of the Republic of South Africa). Please note that if you withdraw your consent at any stage, we may be unable to process your RFQ / RFP.

Yes

☐

No

☐

Supplier Name

Date

Signature

Authorised representative, who warrants that he/she is duly authorised.

MANAGEMENT INFORMATION SYSTEM (MIS SOLUTION)

TERMS OF REFERENCE

1. BACKGROUND

Gauteng Enterprise Propeller (GEP) is an agency of the Department of Economic Development established in terms of GEP Act 5 of 2005 ("the Act") to promote, foster, and develop smaller enterprises in Gauteng. Gauteng Enterprise Propeller utilizes Information and Communication. For GEP's stakeholders to apply for various funding initiatives available at GEP, GEP Online is the primary system facilitating that process.

GEP Online is accessible through a web browser and has been operational since 2017. Once a user has registered on the system the user is then allocated credentials to proceed with the application process. The application including the submission of supporting documents is done on the GEP Online system. GEP Online is not integrated with any other system and has limitations regarding how GEP needs to interact with its stakeholders. As business evolves GEP's systems need to complement the organisation's needs and maturity. To ensure that GEP's systems are aligned with the organisation's strategy necessitated for the development of these terms of reference.

2. PURPOSE

The purpose of this Terms of Reference (ToR) is to appoint a qualified service provider to design, develop, and implement a Management Information System (MIS) for GEP. The MIS aims to enhance GEP's customer experience, improve internal operational efficiencies, and provide comprehensive data governance and reporting capabilities.

3. PROBLEM STATEMENT

GEP endeavours to improve its delivery of great customer experience and tracking of customer applications and enquiries across all touch points. Currently, the problems that are faced by GEP are to provide meaningful turnaround times and efficient feedback to customers when they enquire about application progress and other queries.

3.1. Customer Challenges

- Customers do not have associated system user profiles to log into
- No Tracking of applications by customers
- No meaningful feedback to customers when making queries/enquiries;
- Customers do not receive application progress alerts
- No Customer-Centric processes;
- Non-existent functional guideline or manual
- End-to-end GEP process automation (key processes affecting GEP customer)

3.2. End-User Problems

- Lack of quality / Inaccurate reporting to stakeholders;
- Enhanced customized reporting (across all management levels & shareholders)
- Manual and tedious processes of capturing and processing of applications;
- Unreliable Document Management;
- Limited user restrictions and permission
- Poor turnaround times;
- Duplications amongst others.
- Approval processes (internal approval process to be automated to improve turnaround times)
- Early warning for managers/executives for backlogs and lack of usage by users
- Recording of each instance of all user activities
- Debt Management (module for Contact Centre to schedule calls to debtors)
- Improved Data governance, management and integrity
- Enhanced Due Diligence on applicants and customer profiling
- Advanced automated verification process (address, location, ID, Company Registration, Financial Status, Ownerships) including Credit score check with ITC and Home Affairs)
- No customer relation management

4. SCOPE OF WORK

The appointed service provider will be responsible for delivering an integrated Management Information System that includes the following components:

- **Customer Portal:** A user-friendly web-based portal enabling customer self-service for application submission, status tracking, and interaction history.
- **Contact Centre Management:** An automated contact center management module for efficient call distribution, CTI integration, and tracking.
- **Customer Relationship Management (CRM):** A CRM platform to manage customer profiles and communications.
- **Loan Management Integration:** Integration with external credit check systems (ITC, CIPC, ABIS) for comprehensive loan management and applicant verification.

5. Solution Requirements

The MIS solution must deliver the following functional and technical capabilities:

- **Customer Experience Features:**
 - User profiles, application tracking, and in-portal support.
 - Real-time notifications via SMS and email.
 - Automated guidance and support resources, such as FAQs and a “how-to” repository.
- **Internal User Efficiency Enhancements:**
 - Automation of application processing with alerts for unassigned tasks.
 - Improved document management and secure storage.
 - Due diligence through automated integration with credit bureaus and verification agencies.
- **Technical Requirements:**
 - Platform compatibility with Microsoft Azure, supporting hybrid cloud/on-premise deployment.
 - Scalable, modular architecture with robust security (encryption, disaster recovery) aligned with the Protection of Personal Information Act (POPIA).
 - Capability for scaling in terms of user capacity, data volume, and future functionality.
- **Maintenance and Support requirements:**

The Management Information System (MIS) solution, maintenance and support duration will be **3 years**. This allows for sufficient time to address the below crucial stages elements:

 - ❖ **Initial Stabilization and Issue Resolution:** Post-implementation, where any bugs, system issues, or initial user support needs are addressed.
 - ❖ **Ongoing Maintenance and Updates:** Ensuring the system remains secure, compliant, and aligned with any new requirements or integrations over time.
- **Year 1 (Comprehensive Support):**
 - Full support, covering system fixes, updates, and user assistance as users become familiar with the new MIS.
 - Regular system maintenance to ensure stability and performance.
 - Comprehensive training for the first 6 months of the finalization of the solution
 - Any initial training for new features.

- **Years 2-3 (Standard Support):**
 - Routine maintenance, minor updates, and troubleshooting for issues.
 - Support for user inquiries or additional training sessions if needed.
 - Assistance with system adjustments as GEP's requirements evolve.

6. Deliverables and Outcomes

The successful service provider is expected to deliver the following:

- **Phase 1: Solution Design and Planning**
 - Detailed project plan, including timelines and milestones.
 - Solution architecture and design documentation.
 - Data protection and security protocol documentation.
- **Phase 2: Development and Implementation**
 - Development and deployment of the MIS, ensuring all required components (Customer Portal, CRM, Contact Centre, Loan Management) are fully functional.
 - Integration with required third-party systems (ITC, CIPC, ABIS).
 - User acceptance testing (UAT) and quality assurance.
 - Comprehensive skills transfer not limited to the above three points, for GEP support team to manage the system on service provider exit.
- **Phase 3: Training and Handover**
 - Training materials and sessions for GEP staff and users.
 - Handover documentation, including source code, data structure diagrams, and system configuration guides.
 - Post-implementation support plan covering warranties, maintenance, and update schedules.
- **Phase 4: Reporting and Compliance**
 - Set up of real-time reporting for operational metrics, compliance reports, and stakeholder reports.
 - Compliance documentation and data governance protocols.

Project Delivery timelines

Phase	Duration	Weeks
Phase 1: Solution Design and Planning	9 Weeks	1–9
Phase 2: Development and Implementation	8 Weeks	10–18
Phase 3: Training and Handover	4 Weeks	19–22
Phase 4: Reporting and Compliance	4 Weeks	23–26

The MIS should be accessible to users through a link that will be placed on the GEP's website. External users should be able to access the system through this link and will be allowed to create an account on the system. Once the account is created users would log into the system using their credentials to submit an application for various funding interventions offered by GEP.

The fundamental purpose of the solution entails the capturing of digital applications through the web interface available online.

To deliver an exceptional customer experience and benefit from a full-fledged solution, the following key functionalities are vital to incorporate:

- Contact Center Management component
- Customer Relations Management component

6.1. Manuals

It is assumed that the solution will make provision for the “how to” manuals for first time end-users who wish to complete digital applications online. “How to” manuals will be made available in different file formats including videos, documents, images and perhaps voice notes by way of a clickable hyperlink option or other methods.

6.2. Warranty and Indemnities

The developer should warrant GEP that the software (and use of it) will not infringe third party copyright. This is tantamount to the developer saying they haven't misappropriated third-party software to develop what they provide you.

6.3. Ownership

Where the intention is for GEP to own the project IP, it is necessary to ensure that the software solution developer agrees to take all necessary steps to formalise the relevant assignment of IP to GEP, consisting of the source code and the database.

6.4. Technical Requirements

- The recommended infrastructure details for deploying the proposed solution either on a Cloud platform or on-prem.
- The solution deployment architectural plan with diagrams, identifying components and specifications for each component with description.
- The description must detail the number of servers, specifications for each resource (Web server, Application, DB, File server, Resource Monitoring servers etc.), Operating System and configuration as well as function of each server, Network Bandwidth Requirements and Storage Requirements.
- Solution security, disaster recovery plan, and backup requirements.
- GEP uses Microsoft Technologies. If GEP is expected to manage the different layers, the MIS solution must run on Microsoft platforms. Alternatively, the application should run as Platform As A Service (PAAS) or (SaaS) Software as a service.

6.5. Functional Requirements

- Automation of GEP's core business processes
- Integration with existing GEP systems
- Receive proposals / applications and enquiries on a central platform
- Processing of proposals / applications
- Processing of enquiries
- Customized reporting:
 - ✓ Legislative requirements
 - ✓ Provincial requirements (Office of the Premier)
 - ✓ GEP's requirements (Board and Board Committees; EXCO; MANCO; Regions, Strategy, Monitoring and Evaluation; and other business units)

- Alerts (Early Warning system and Escalations):
 - ✓ For backlog
 - ✓ When Activities that are not performed
 - ✓ Users not logging on (per group, per region, per day, per week, per month, Quarterly, annually)
- Verify the location or proof residential address of applicants (FICA)
- Verification and Validation of applicants/customers' credit information to credit bureaus
- Verification and Validation of companies with CIPC
- Remove any incomplete application and inform the applicant
- Reduce turnaround-times or lesser, by automating key and core business processes end-to-end (customer value stream automation)
- Autosave functionality during the application process and roll-back to previous working state in case of disruption

6.6. Automatic Call Distribution (ACD) to manage the flow of incoming calls and to route them to the most appropriate agent.

- A dialer to place and complete calls.
- Call recording system to capture all interactions so that they can be replayed if there is a question about an interaction.
- Interactive voice response (IVR) and speech recognition to handle calls when agents are not on duty.
- Quality management application to measure how the contact centre agents adhere to internal policies and procedures that are meant to provide a quality service; and to give insight into the contact centre performance.
- Computer Telephony (CTI) that will bring up the relevant customer details on the contact centre agent desktop when it delivers a call.
- Campaign Management – The contact centre system should provide for promotions / communications to all clients registered on the database via mail and/or Bulk SMS, with an option for clients to OPT OUT in compliance with the Protection of Personal Information Act and other relevant acts and legislation pertaining to the use and storage of personal information.

The Customer Relation Management system component to have a capability to capture and track progress of proposals / applications submitted via the Regional and Satellite Offices, Head Office and Online submissions which are subjected through the Deals Screening Process.

6.7. Processing of Applications functional requirements is as follows:

- GEP should be able to capture proposal details on the system, including the relevant proponent details (Including proposals submitted via the Request For Proposals/Applications & Walk-ins Applicants).
- Supporting the application documentation will be scanned and should be stored on the system and be linked to the proponent
- The proponent should be able to complete and / or submit their proposals / applications online, together with the required supporting documentation.
- The system should reject the proposal / application if the supporting documentation is not submitted in full.
- The system should generate a reference number that is linked to the application
- The system should send an SMS and/or E-mail to the proponent acknowledging receipt of their proposal / application and provide them with the generated reference number that will be used to track progress of their proposal / application.
- The Deals Screening Panel Administrator should be able to forward the application to a recipient in the executing Department and update the deals repository register accordingly
- All interactions (to and fro') with the proponent regarding their proposal / application prior to it being forwarded to the executing Department should be captured in the system
- The executing Department should be able to assign the application to the responsible person in the department and update the deals repository register accordingly

- The responsible person in the executing Department should be able to complete the due diligence, appraisal report and financial model documentation on the system and link these to the respective application.
- All interactions with the applicant during the due-diligence and appraisal processes, together with the applicant's responses should be captured in the system
- The responsible person should be able to update the progress of processing the application, including the customer interactions and their responses on the deals repository register
- Should 5 working days elapse without there being an update on the deals repository register, an alert should be sent to the responsible person in the executing Department and to the Contact Centre agents?
- Proponents should be able to track the status of their applications on-line via the issued reference number

6.8. Enquiries System functional requirements

- The Enquiries system component will be used to track and monitor the status of enquiries and applications by clients/customers, stakeholders and shareholder
- For all new enquiries, the Contact Centre agents should be able to capture the details of the enquirer and the enquiry when a client calls
- The system should generate a unique reference number related to the call
- The Contact Centre agent should be able to assign the details of the call to the relevant executing department
- The executing department should be able to update the progress of the call
- Should 5 working days lapse without there being an update on the enquiry, an alert should be sent to the responsible person in the executing Department and to the Contact Centre agent.
- The Contact Centre agent should be able to update the status of the enquiry (Assigned, In Progress, Resolved, Closed, Cancelled, etc.)
- For all calls, the system should deliver a "screen pop" bringing up the updated deals repository register with the latest update of the caller's application progress
- The contact Centre agent should be able to record the details of the interaction above in the system
- Status of enquiries should be available on-line for clients via the issued reference number

6.9. Reporting System functional requirements

- The Automated Reporting Systems (for Contact Centre, Processing of applications and Enquiries) should generate reports in tabular, graphical and narrative formats and on Excel, PD, CSV, and HTML.
- Ability to generate customized reports e.g:
 - Contact Centre performance reports
 - Contact Centre Agents quality reports
 - Loan management reports
 - Consolidated GEP performance reports
 - Number of applications received, approved, rejected
 - Number of applications per sector, per transversals (Youth, Women, PWD), demographics / region and value of the required funding
 - Status of applications per sector, transversal and demographics
 - No of applications terminated due to no response from proponents
 - Enquiries per region per area
 - Status of enquiries (Opened, In Progress, Closed, etc.) per region
- All the above reports should be downloadable in Excel, PD, CSV, and HTML.

7. POTENTIAL INTERFACES

Agency/Bureau	Stakeholder	Support Role	Interfaces
Provincial Government	GDED	Reports	TBD
National Government	Department of Small Businesses	Reports	TBD
Office of the Premier			
Credit Bureau	TBD	Verification and Validation of applicants/customers' credit information	TBD
DTI	CIPC	Ownership Verification/Validation	TBD
DFIs	TBD	Data Warehouse	TBD
SAPS	TBD	Criminal Records	TBD
GEP Clients	A potential client		TBD
SARS	TBD	Tax Compliance verification	TBD
DHA	TBD	ABIS for citizenship verification	TBD
Local government	LED	Database warehouse and verification of applicants/information	TBD
GEP	Internal systems	Business process integration and reporting	TBD

8. ADMINISTRATIVE COMPLIANCE

NB: In order to ensure compliance and streamline the evaluation process, please adhere to the following requirements:

STAGED APPROACH WHICH WILL BE APPLIED IN THE EVALUATION OF BIDS

Evaluation of the bids will be conducted in two stages as per Preferential Procurement Regulations, 2022 issued in terms of section 5 of the Preferential Procurement Policy Framework Act, Act number 5 of 2000 (PPPFA) as follows:

Stage One will be the evaluation of bids on Administration Compliance, and Technical Evaluations.

During these stages, the bidder/s that do not meet the minimum requirements and thresholds as per each stage of evaluation will be disqualified and will not be considered for further evaluation.

Stage Two evaluation will be based on Price and Preference points only.

- Price = 80 points
- Preference = 20 points

STAGE 1A: ADMINISTRATIVE COMPLIANCE

1. Bidder/s must complete, sign (where required), and submit all pages of Tender Bid Documents Section 1 (RFP-Request for Proposal) and Section 2 (Price Schedule – Professional Services).
2. Submission of fully completed and signed Standard Bidding Documents (SBD 01, SBD 04, and SBD 6.1)
3. Submission of completed and signed Protection of Personal Information Act Consent form
4. If there will be a share of services between Tenderer i.e., Joint Venture/Consortium, all participating parties must submit the following supporting documents:
 - Service Agreement stating the roles and the share percentage of the value of the undertaken project signed by all parties, i.e., Letter of Authority from both or all companies bidding for this tender.

OTHER REQUIRED DOCUMENTS:

- A valid Tax Compliance Status (TCS) Pin code issued by the South African Revenue Services (SARS)
- A Valid B-BBEE Certificate or Sworn Affidavit.
- Provide the latest independently reviewed financial statements with comparative years, alternatively, if no audited annual financial statements are available, provide the latest management accounts with comparative years signed by the accountant. Companies that are not required to be audited must provide a letter from the accountant attesting thereto. Companies that are new or dormant are not required to submit audited financial statements.
- Full Central Supplier Database (CSD) report.
- A valid copy of the Company and Intellectual Property Commission (CIPC) Certificate.

9. Submission Requirements

- 9.1.** Bidders are required to submit the following documents:
- 9.2.** Company profile highlighting experience relevant to this project.
- 9.3.** Detailed proposal addressing all requirements and deliverables outlined in this Terms of reference.
- 9.4.** Project plan, including timelines and resource allocation.
- 9.5.** Evidence of previous MIS implementations and references from similar clients.
- 9.6.** Cost proposal, including any licensing fees and support costs.

NB: Failure to submit may lead to the bid deemed non-responsive.

10. Submission guidelines: Submission via email or other electronic means will not be accepted

Bidders are required to submit their proposals as **indexed and properly bound documents** to ensure clarity, organization, and ease of review. The document submission should adhere to the following guidelines:

10.1. Indexing:

- Each section of the proposal must be clearly indexed with a table of contents at the beginning.
- Include section dividers or tabs where necessary, to ensure easy navigation between different sections.

10.2. Binding:

- Proposals must be professionally bound (e.g., spiral binding, perfect binding) to prevent loss of pages or disorganization.
- Loose or stapled pages will not be accepted, as they may compromise the document's integrity during the review process.

10.3. Document Format:

- All pages should be numbered sequentially.
- Important information, such as company details, contact information, and bid reference number, should appear on the cover page.
- Use a clear, readable font and ensure that all supporting documents (e.g., certificates, reference letters) are legible.

10.4. Submission Copies:

- Submit the required number of hard copies and an electronic copy as specified in the bid instructions.

11. Physical Submission

- 11.1. Bidders are required to submit **one original** and **one electronic copy** of the bid proposal in hard copy. All documents must be securely bound in a clearly marked envelope/package.
- 11.2. The envelope/package must be labeled with:
- 11.3. Bid reference number
- 11.4. Bid description
- 11.5. Bidder's name and contact details
- 11.6. Addressed to: SCM unit HEAD OFFICE 6th Floor, 124 Main Street, Johannesburg, 2107

Important: Late submissions will not be considered.

12. USB Electronic Copy

- 12.1. In addition to the physical copy, bidders must also provide a complete electronic copy of the bid on a USB flash drive. The electronic copy should mirror the physical submission.
- 12.2. The USB must be clearly labeled with:
- 12.3. The electronic copy should be in PDF format and organized according to the same structure as the physical submission. Please ensure that the file is virus-free and can be easily accessed.

13. Separate Submission for Financials

- 13.1. To facilitate a fair and transparent evaluation process, the **financial proposal** must be submitted in a **separate sealed envelope** from the technical proposal. This applies to both the physical and electronic submissions.
- 13.2. The envelope containing the financial proposal must be labeled with:
- 13.3. Bid reference number:
- 13.4. "Financial Proposal" clearly marked
- 13.5. Bidder's name

The financial proposal on the USB must also be in a **separate file** from the technical submission, clearly marked as **"Financial Proposal"**.

14. Submission Deadline


- 14.1. All bids (both physical and USB copies) must be submitted as per the bid closing date and time.
- 14.2. Bids received after the deadline will not be considered.
- 14.3. Please ensure full compliance with these submission guidelines to avoid any disqualification.
- 14.4. For any further information or clarification, please contact enquiries as per the bid documents.
- 14.5. We appreciate your participation in this tender and look forward to receiving your bid.

15. EVALUATION CRITERIA

CRITERION	DESCRIPTION	WEIGHT
1. Technical Approach and Solution Design Objective: Evaluate the bidder's understanding of the project requirements and their approach to designing the MIS solution. This includes whether the proposed solution aligns with GEP's needs and includes all components (Customer Portal, CRM, Contact Centre, Loan Management). Minimum Threshold: 4	<p>5 (Excellent): Comprehensive solution design with clear diagrams, detailed descriptions of each component, and innovative solutions aligned with GEP's goals. Clear demonstration of automated processes for tracking, reporting, and customer support.</p> <p>4 (Good): Detailed design covering most components with minor gaps in integration or clarity but overall meets GEP's requirements.</p> <p>3 (Satisfactory): Adequate design that meets all basic requirements, but lacks detail in certain components (e.g., integration, automation).</p> <p>2 (Below average): Partial Minimal or unclear design that does not adequately cover all components.</p> <p>1 (Poor): Minimal alignment, vague solution design.</p>	30%

Moulding Entrepreneurs	0 (Non-compliant): No clear solution design or major gaps in the requirements	
<p>2. Experience and Expertise</p> <p>Bidders to submit detailed CVs of proposed personnel (refer to below CV template)</p> <p>Objective: Does bidder have relevant experience and the necessary skills to execute the project, especially in similar sectors Minimum Threshold: 3 (This applies separately for the PM and the Team i.e. Both PM criteria minimum is 3 and the minimum for team composition is 3)</p> <p>Recognised qualifications and certifications: submit copies of qualifications</p> <p>Qualifications</p> <ul style="list-style-type: none"> National Diploma or bachelor's degree in project management, Business Information Systems, or ICT. Information Security, or Computer Science, Software Engineering or related <p>Certifications</p> <ul style="list-style-type: none"> PMP (Project Management Professional) or Prince2. CISSP (Certified Information Systems Security Professional), CompTIA Security+, or Certified Information Security Manager (CISM) Microsoft Certified Solutions Developer (MCSD) or Java Certified Programmer Microsoft Certified Database Administrator (MCDBA) or Oracle Certified Professional (OCP) or related 	<p>Project Manager Experience:</p> <p>5 (Excellent)= 10+ years in IT project management, with 5+ years leading MIS or similar projects holds advanced qualifications (Bachelor's or Master's) and relevant certifications.</p> <p>4 (Good) = 7+ up to 10 years in IT project management, including 3–5 years in MIS or similar projects; bachelor's degree in IT/ICT with relevant project management certifications (e.g., PMP, Prince2).</p> <p>3 (Satisfactory) = 5+ up to 7 years in IT, including 2–3 years in MIS or similar projects; bachelor's degree; basic project management certifications.</p> <p>2(Below average) = 3+ up to 5 years in IT; limited MIS project experience; basic qualifications (certificate or diploma)</p> <p>1 (Poor)= Less than 3 years of general IT experience; no MIS project experience or qualifications.</p> <p>0 (Non-compliant) = No relevant experience or qualifications provided for the Project Leader</p> <p>Proposed team experience (Minimum of 2 specialists excluding Project Manager)</p> <p>5 (Excellent) Highly skilled team; each member has 5+ years in their area of expertise, with prior MIS project experience; relevant degrees and certifications; past success in delivering similar large-scale projects.</p> <p>4 (Good) Competent team; each member has 3+ up to 5 years of experience, with some MIS or similar project exposure; relevant degrees, some industry certifications; strong knowledge in key solution components.</p> <p>3 (Satisfactory) Satisfactory team; mixed experience levels (2 + up to 3 years), some with MIS experience; basic qualifications (diplomas or certifications); can cover all solution components.</p> <p>2 (Below average) Limited experience; most team members have 1+ up to 2 years in IT, with minimal MIS exposure; basic qualifications; may lack depth in some solution areas.</p> <p>1 (Poor) Minimal experience; less than 1-year, general IT knowledge only, with no relevant MIS project experience; lacks required qualifications or certifications.</p> <p>0 (Non-compliant) No relevant experience or qualifications provided for the Supporting Team.</p>	<p>15%</p> <p>10%</p>
<p>3. Proven Track Record:</p> <p>The company's record regarding similar projects in</p>	<p>5 (Excellent) Proven Track Record: Detailed project portfolios, case studies, or client testimonials that demonstrate the team's successful delivery of similar projects, with measurable outcomes like increased efficiency or customer satisfaction. 6+ written</p>	<p>15%</p>

<p>delivering MIS solutions</p> <p>Growing Gauteng Together</p>	<p><u>and signed off client reference letters signed on client letterhead</u></p> <p>4 (Good) Project Success: The team provides project summaries demonstrating basic competence in executing similar projects but may lack depth in customer-centric MIS applications <u>4-5 written and signed off by client reference letters signed on client letterhead</u></p> <p>3 (Satisfactory): Basic portfolio with limited client feedback but demonstrates experience; minimal measurable outcomes. <u>3 client reference letters signed on client letterhead.</u></p> <p>2 (Below Average): Limited portfolio with few MIS-related projects and lacking client testimonials. <u>1-2 client reference letters signed on client letterhead.</u></p> <p>1 (Poor): Minimal relevant experience and non-relevant reference letters.</p> <p>0 (Non-compliant): No documented experience or client references letters provided.</p>	
<p>4. Implementation Plan and Timelines</p> <p>Objective: bidder has a realistic and well-organized timeline with defined stages (design, development, testing, implementation) that minimizes disruption.</p>	<p>5 (Excellent): Comprehensive plan with clear milestones and contingencies; realistic and well-structured timeline.</p> <p>4 (Good): Realistic plan with milestones; minor improvements possible in detail.</p> <p>3 (Satisfactory): Adequate timeline with basic milestones; meets GEP's needs.</p> <p>2 (Below Average): Vague or unrealistic timeline; lacks key details.</p> <p>1 (Poor): Minimal or unclear or unrealistic timeline; impractical plan.</p> <p>0 (Non-compliant) non-submission of timeline, defined phases or milestones.</p>	10%
<p>5. Data Security and Compliance</p> <p>Objective: Ensure the solution includes strong data protection measures, meets regulatory standards (POPIA), and minimizes risk. Minimum threshold 4</p>	<p>5(Excellent): Robust data protection plan that includes encryption, access controls, regular data backups, and compliance with POPIA and other laws.</p> <p>4 (Good): Adequate data protection measures covering most regulatory needs.</p> <p>3 (Satisfactory): Basic compliance, security measures are adequate.</p> <p>2 (Below average): Limited compliance; some security gaps. Insufficient data protection and compliance measures, putting GEP at risk.</p> <p>1 (Poor): Minimal security; does not meet compliance standards.</p> <p>0 (Non-compliant): No security or compliance plan</p>	10%
<p>6. Support and Maintenance</p> <p>Objective: Assess the quality and duration of post-implementation support offered, including warranties, training, and response times for issue resolution.</p>	<p>5(Excellent): Detailed support plan with post-implementation support, SLAs, training schedules, skills transfer and warranty details. Response times and support terms are clearly defined.</p> <p>4 (Good) : Satisfactory support plan covering most areas with skills transfer and training but lacking some specifics on response times</p> <p>3 (Satisfactory): Basic support plan with limited post-implementation services and unclear SLAs.</p> <p>2 (Below average): Limited support offerings; lacks key details.</p> <p>1 (Poor): Minimal or unclear support offerings, with no defined warranty or training plans.</p>	10%

Moulding Entrepreneurs <i>Growing Gauteng Together</i>	0 (Non-compliant): No support or maintenance plan provided	
Bidders must score 70%+ to proceed to phase 2 price and preference points NB: if no bidders score 70% GEP will consider those that score 65%+ In Phase 2 of the evaluation process, the selection will be based on an 80/20 Price and Preference Points System : <ul style="list-style-type: none"> 80% of the total score to the price proposal 20% of the total score to preference points, which will consider the company's preference criteria specified as per line item 12: preference points applicable 		100%

16. Example of Method of calculation for evaluation

Criterion	Rating scored	Weight calculation	Total achieved
Technical approach	4/5	30% (4 x .30 = 1.20)	1.20
Experience PM	5/5	15% (5 x 0.15 = 1)	1.00
Experience Team	3/5	10% (3 x 0.10 = 0.30)	0.30
Track record	4/5	15% (4 x 0.15 = 0.60)	0.60
Implementation plan	5/5	10% (5 x 0.10 = 0.50)	0.50
Data security	2/5	10% (2 x 0.10 = 0.20)	0.20
Support	1/5	10% (1 x 0.10 = 0.10)	0.10
Total of weighted scores			3.6/5 = 0.72
Convert to percentage maximum possible rating score is 5			0.72 x 100 = 72% achieved for the bidder
Percentage score = (3.6/5) x 100 = 72%			

17. Disqualification Criteria for Minimum Scores

To ensure that critical elements are adequately addressed, respondents must meet the **minimum threshold** scores in the following areas. If a bidder scores below the threshold in any of these critical criteria, they will be disqualified from further evaluation.

- Technical Approach and Solution Design:** Minimum score of **4** is required to demonstrate that the bidder has a clear understanding and capability to design a solution aligned with GEP's needs.
- Experience and Expertise:** Minimum score of **3** to confirm that the bidder has adequate experience and expertise to handle a project of this nature.
- Data security and compliance:** Minimum score of **4** to confirm that the bidder has sufficient security measures in place.

18. Demo presentation

GEP reserves the right to request shortlisted companies to present a live demonstration of their proposed solution. This demonstration will allow us to assess the functionality, user interface, and alignment of the solution with our requirements. Service providers will be protected by a declaration of intellectual property rights.

19. Cost Proposal: All costing must be in South African Rands

- 19.1.** GEP requires transparency and alignment of costs with GEP's budget, including detailed breakdowns for development, licensing, support, and any recurring fees
- 19.2.** Transparent, detailed breakdown of costs per phase, including all fees (licensing, support, etc.). No hidden costs, with all deliverables clearly covered
- 19.3.** Provide costing for fixed and roaming internal users

20. Phase 2 Preference points applicable:**20.1. Preference points will be scored in terms of the below**

The specific goals allocated points in terms of this tender <u>Bidder must also submit the following Proof of evidence to claim the allocated points:</u> Youth Ownership – certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy Woman Ownership – certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy Ownership by People with Disability – copy of Medical Certificate that is stamped by a medical practitioner NOTE: Submitted information will be verified through various platforms.	Number of points allocated(80/20 system) (To be completed by the organof state)	Number ofpoints claimed (80/20 system) (To be completedby the tenderer)
Women (requirement is 51 %+ ownership)	12	
Youth (requirement is 51 %+ ownership)	4	
People with disabilities (requirement is 51 %+ ownership)	4	

Points for the above specific goals will be measured by calculating the pro-rata percentage of ownership of the bidding company that meets this criterion. E.g., Company A has five shareholders each of whom owns 20% of the company. Three of the five shareholders meet the criterion, i.e. they are women/ PwD/youth. Therefore, this bidder will obtain 60% of the points allocated for the goal and the resultant number will be rounded off to two decimal places.

NOTE: Bidders must complete and sign SBD 6.1, failure to submit completed and signed SBD 6.1 will lead to a non-award of points.

CV Template

PERSONAL INFORMATION

Name	
Date of Birth	
Nationality	
Address	

QUALIFICATIONS

Qualification	Institution	Year Completed

PROFESSIONAL EXPERIENCE

Position	Organization	Start Date	End date	Role & Responsibilities

CONTACTABLE REFERENCES