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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 81 - 2022/23

REQUEST FOR QUOTATIONS

TERMS OF REFERENCE FOR APPOINTMENT OF A SERVICE PROVIDER TO SUPPORT AND MAINTAIN A CLOUD BACKUP AND DISASTER RECOVERY SERVICES

1. INTRODUCTION

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No. 97 of 1998 to advance skills levels in accordance with the National Skills Development Plan (**NSDP**). The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce in order to benefit employers and employees in the ETD sector

The ETDP SETA will host a **COMPULSORY** virtual briefing session for **RFQ NO: 81 - 2022/23** for the *appointment of a service provider to support and maintain a cloud backup and disaster recovery services*, on **15 March 2023 at 11h00**. Interested members must please communicate their interest to join in the session, **before 13 March 2023**. To attend and get access to the session, please email: TienieJ@etdpseta.org.za with your Name, Surname, Company Name, Email address and Cellphone Number. Access details **will only be shared** with those that confirmed. **Please do not forward the link further**. We thank you for your cooperation.

NB: THE MEETING ROOM FOR THE COMPULSORY BRIEFING SESSION WILL CLOSE AT 11H15

The ETDP SETA reserves the right not to award the RFQ.

2. PURPOSE AND OBJECTIVES

2.1. PURPOSE OF THE PROJECT

The ETDP SETA is looking for a suitably qualified service provider to support and maintain a Microsoft Azure Cloud Backup and Disaster Recovery Solution which will cover all areas of business within the organisation including provincial sites. The Service Provider is expected to provide services, technology infrastructure and conduct regular testing of backups and recovery procedures to ensure effective ICT Service Continuity.

2.2. OBJECTIVES

ETDP SETA seeks to implement Disaster Recovery as a Service (DRaaS) on a public cloud provider service model that allows an organization to back up its data and IT infrastructure in Microsoft Azure cloud computing environment and provide all the disaster recovery orchestration to regain access and functionality to IT

infrastructure after a disaster. The main objective of the required solution is to provide an appropriate level of resilience and response measures aimed at:

- Ensuring the continuity of critical processes through which programmes and services are delivered, before the organisation's survival is threatened by their loss; and
- Limiting the period and impact of an operational disruption.

3. PROJECT SCOPE AND REQUIREMENTS

3.1. Overview

The ETDP SETA comprises of 9 sites, a head office in Johannesburg and nine (8) provincial offices. Each Provincial office has one physical server which hosts Domain Controller, file storage, and print server functions. Primary domain control is located within the Azure cloud infrastructure. At the head office, there are both physical and virtual servers and most applications are running on premises with emails hosted on Office 365. Thus, the proposed solution should cater for monthly cost fluctuations for backup and recovery as some of the services get migrated to the cloud.

In the event of a major incident or disaster, it is expected that the implemented solution will assist the ETDP SETA to recover its data and systems quickly to minimise downtime. The ETDP SETA seeks to enable cloud backup and disaster recovery services for the following:

No.	Applications (e.g. SQL)	Backup Frequency	Operating System	Virtual or Physical	Virtual platform (VMware or Hyper-V)	No of CPUs	RAM in GB	Storage total in GB	Free space in GB	Total used space in GB
1	Provincial Server 1	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
2	Provincial Server 2	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
3	Provincial Server 3	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
4	Provincial Server 4	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
5	Provincial Server 5	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
6	Provincial Server 6	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
7	Provincial Server 7	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
8	Provincial Server 8	Daily	Windows Server 2016 Standard Edition (x64)	Physical		1	32	5309	4610	699
9	NAS (storage)	Daily	Windows Server 2012 R2 Standard Edition (x64)	Physical		1	16	16606	3923	12683
10	Webserver host	Daily	Windows Server 2012 R2 Standard Edition (x64)	Physical		2	32	1117	113	1004
11	Host VIP	Daily	Windows Server 2016 Standard Edition (x64)	Physical		2	32	3353	1794	1559
12	APP HR	Daily	Windows Server 2016 Standard Edition (x64)	VM	MS	1	8	100	41	59
13	M-Files	Daily	Windows Server 2012 R2 Standard Edition (x64)	VM	MS	1	8	5419	2202	3217
14	Host-Service Desk	Daily	Windows Server 2012 Datacenter Edition (x64)	Physical		1	32	3726	1088	2638
15	SQL - VM	Daily	Windows Server 2012 R2 Standard Edition (x64)	VM	MS	2	32	1099	522	577
16	File Server	Daily	Windows Server 2016 Standard Edition (x64)	Physical		2	40	2291	100	2191
Total						20	456	76183	46663	29520

N/B

1. Servers highlighted in yellow are mission critical and the service provider should accommodate for failover to the recovery site in the event of a disaster
2. Storage estimates have been given for provincial servers
3. Data lines at Provincial Offices: 10 Mbps primary fibre link, 4Mbps failover wireless link
4. Head Office: 40Mbps Primary fibre link, 20Mbps failover wireless link

3.2. Technical Requirements

The service provider shall submit a proposal that addresses the following requirements:

- a) Ability to perform daily incremental backups.
- b) Ability to conduct regular restores.
- c) The proposed solution must include local disk backup infrastructure for easy restoration.
- d) Provide daily back up success notifications.

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- e) Provide weekly and monthly backup reports.
- f) Backup retention [daily (7 days), weekly (4 weeks), monthly (12 months), annually (5 years)].
- g) Replication to take place every 15 minutes.
- h) Ability to failover mission-critical servers to disaster recovery site.
- i) Enable manual failover within an hour of a failure for mission-critical servers (*highlighted in the table above*).
- j) Accommodate failover for a maximum period of two weeks.
- k) Quarterly recovery (failover) and restore tests.
- l) Each provincial site must be able to back up to the cloud.
- m) Fully managed backup and Disaster recovery as a service
- n) Complete end-to-end configuration and installation of the backup and disaster recovery infrastructure.
- o) The ETDP SETA to have full access to the backup and disaster recovery platform.
- p) Ensure a safe, secure and resilient cloud backup and disaster recovery solution.
- q) Both backup and replication to be confined within South African borders.

4. DELIVERABLES

- 4.1. A detail project execution plan outlining the implementation processes, approach, resources tools and allocation, timelines (realistic with key milestones) and deliverables
- 4.2. Weekly, Monthly, Quarterly and Annual Reporting of statuses and activities related to Cloud Backup and Replication

5. DURATION OF THE AGREEMENT

The duration of the agreement will be **12 months** including implementation, support and maintenance after the signing of the Service Level Agreement (**SLA**).

6. COSTING MODEL (PRICING SCHEDULE)

The ETDP SETA is currently in the process of migrating some of services to the cloud. Thus, the billing should be done monthly to accommodate cost fluctuations (reductions) should some services move to the cloud.

The Bidder must provide a signed costing proposal on the company letterhead. **All pricing shall be in South African Rand (ZAR)**. All project milestones with costing should be listed on the pricing schedule including once off setup costs.

7. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2022. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USB) must have documents for Stage 1 and Stage 2

7.1. STAGE 1 [Folder A (USB)]

Bidders will be evaluated on the submission of the requested mandatory documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked.

7.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. Declaration of Interest – **SBD 4**
2. Competency letter or competency confirmation for backup and disaster recovery from the relevant Cloud Provider.

7.2. STAGE 2 [Folder A (USB)]

The evaluation of this bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid documents.

- 9.1.1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
- 9.1.2. Only bids that achieved the minimum qualifying score for functionality will be evaluated further in accordance with the **80/20 preference point systems prescribed in Preferential Procurement Regulations 5 and 6.**

The evaluation criteria for functionality will be as below:

NO	QUALIFYING CRITERIA FOR SHORT LISTING	POINTS
1.	<p>Company experience: Company's proof of implementing cloud backup and disaster recovery solutions within RSA. (Provide signed proof on the referee's company letterhead)</p> <p>1.1. Company experience: Experience in implementing cloud backup and disaster recovery solutions. (20)</p> <ul style="list-style-type: none"> ○ 5 years and above = 20 ○ 3 to 4 years = 15 ○ 1 to 2 years = 10 ○ Less than 1 year = 0 <p>*[Each reference must clearly indicate;</p> <ul style="list-style-type: none"> ● the name of the bidder and the project ● objectives of the project (nature of the project) ● duration of the project ● recommendation and contact details of the referee as well as proof of completed project(s) and ● must be signed. <p><i>NB: If any of the above information is omitted/missing, will lead to the reference letter(s) not allocated points</i></p> <p><i>NB: In the event of sub-contracting, the service provider must submit the above reference letters of the main contractor and the main contractor's certificate to the service provider indicating the service provider's involvement in the specific project(s).</i></p>	20
2.	<p>Project Deliverables: 40</p> <p>2.1 A solution proposal detailing the work to be implemented against these terms of reference. The proposal should respond to all items listed in section 3.2 of the terms of reference (30)</p> <ul style="list-style-type: none"> ○ Solution Proposal addresses all the requirements = 100% (30) ○ Solution Proposal addresses most of the requirements = 90-99% (20) ○ Solution Proposal addresses some of the requirements = 80-89% (15) ○ Solution Proposal addresses below 80% of the requirements = (0) <p>2.2 Milestone based project implementation plan indicating delivery period (10)</p>	40
3.	<p>3.1 Project Manager experience. Attach CV - The CV must clearly indicate the project management experience in cloud backups and disaster recovery solutions implementation and respective clients with contactable references. (20)</p>	40

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	<ul style="list-style-type: none"> ○ More than 5 years = 20 ○ 3 - 5 years = 15 ○ 1 to less than 3 years = 10 ○ Less than 1 = 0 <p>3.2 Relevant experience of Lead Technical Person. Attach CV - the CV must clearly indicate projects where they have implemented cloud backup and disaster recovery with contactable references. (20)</p> <ul style="list-style-type: none"> ○ More than 5 years = 20 ○ 3 - 5 years = 15 ○ 1 to less than 3 years = 10 ○ Less than 1 = 0 	
TOTAL		100

Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to validate the information submitted. Points will be awarded on a sliding scale only where indicated.

Please take note of the value and scoring point system of your bid.

7.3. STAGE 3 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. Submit a **"Unique security personal identification number (PIN) issued by SARS" which the SETA will use to verify the bidder's tax matters prior to the award**
- c. Invitation to Bid - **SBD1**
- d. B-BBEE certificate or sworn affidavit (**If claiming preferential points**) – **this will be used to verify points to be allocated for specific goals**

80/20 preference point system shall be applicable as follows:

- ✓ Price **80**
- ✓ Allocation of specific goals **20**

The ETDP SETA shall allocate the specific goals as follows:

PREFERENCE GOAL	80/20	Documents for verification
GOAL 1 – Ownership		
Maximum Points	15	
Business owned by more than 50% black persons	8	ID copy of Director/Owner and CSD report
Business owned by less than 50% black persons	2	ID copy of Director/Owner and CSD report
Business owned by more than 50% black women	4	ID copy of Director/Owner and CSD report
Business owned by less than 50% black women	1	ID copy of Director/Owner and CSD report
Business owned by more than 50% youth	2	ID copy of Director/Owner and CSD report
Business owned by more than 50% disabled persons	1	Medical report /Certificate
GOAL 2 – Economic Reconstruction and Recovery Programmes		Documents for verification
Maximum Points	5	
SMME/QSE/EME/Cooperatives/NPCs/NPOs/CBOs	2	B-BBEE Certificate/Sworn Affidavit/Company registration documents
Promotion of business located in the province where goods and services are required	2	CSD and proof of municipal account /affidavit
Promotion of business located in South Africa	1	CSD and proof of municipal account /affidavit
TOTAL POINTS	20	

NB: Should a supplier not submit the below documents they will not be awarded points for that specific goal:

- **B-BBEE Certificate/ Sworn Affidavit**
- **ID copy of Director/Owner**
- **Latest CSD report**
- **Disability Medical report/Certificate**
- **Company registration documents**
- ✓ • **Proof of municipal account**

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers.

8. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserves the right to negotiate the bidder's price.
3. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned or submitted by facsimile will **NOT** be accepted.
5. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals.
6. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less to be used to verify eligibility for allocation of points for specific goals.
7. A Qualifying Small Enterprise (QSE) is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million** and **level of black ownership** or a B-BBEE level verification certificate to be used to verify eligibility for allocation of points for specific goals.
8. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that no points will be allocated for specific goals.
10. Bids submitted are to hold good for a period of 90 days.
11. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
12. All suppliers must be registered on the **Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.

9. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Open RFQs as from **12h00** on **08 March 2023**.

Bidders must submit technical and financial proposals in **two separate USBs** clearly marked “**Folder A- Technical Proposal**” and “**Folder B- Financial Proposal**”.

Folder B - (Financial Proposal) must include the Costing Model (*Price must be final, include VAT and signed*), Submit a “*Unique security personal identification number (PIN) issued by SARS*” **which the SETA will use to verify the bidder's tax matters prior to the award**, Invitation to Bid - **SBD1**, and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – **this will be used to verify points to be allocated for specific goals**

All Bids/Proposals (completed in [two separate USBs]) must be courier or hand delivered to:

The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Ghandi Square
Johannesburg South - CBD
2091

OR

Sent via email to TienieJ@etdpseta.org.za or etdpsetarfq@etdpseta.org.za

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of 11h00 on **23 March 2023**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before 11h00 on **23 March 2023**.

11. CONTACT PERSON

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID. All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Management: Email: Tieniej@etdpseta.org.za or SibusisoK@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.