INVITATION TO SUBMIT A PROPOSAL FOR REQUIREMENTS OF THE SOUTH AFRICAN BUREAU OF STANDARDS (SABS)

RFP NUMBER: 201928

DESCRIPTION: The appointment of one or more service providers to a framework agreement for the provision, implementation, and support of an Enterprise Resource Planning (ERP) solution, including related modules, for a period of sixty (60) months. This includes the provision of ongoing support and maintenance services for SABS.

CLOSING DATE: 8ᵗʰ April 2026

CLOSING TIME: 11:00am

Copyright Notice:

Milestones	Date & E-mail address
Briefing Session	Date: 25ᵗʰ March 2025 Time: 10:00 AM – 11:30 AM **Microsoft Teams meeting Join:** https://teams.microsoft.com/meet/34220981423214?p=HNnsOYrJc9qMAg9DHB Meeting ID: 342 209 814 232 14 Passcode: jc3bD9cQ

NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	(CODE)		(NUMBER)	
CELLPHONE NUMBER				
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				

NAME OF AUTHORISED PERSON	
SIGNATURE OF BIDDER	
CAPACITY UNDER WHICH THIS BID IS SIGNED	
DATE	

1. **Intent**

   The South African Bureau of Standards (SABS) invites experienced and reputable suppliers (bidders) to submit proposals for the appointment of one or more service providers to a framework agreement for the provision, implementation, and support of an Enterprise Resource Planning (ERP) solution, including related modules, for a period of sixty (60) months. This includes the provision of ongoing support and maintenance services for SABS.

2. **Confidentiality**

   This document may not be used for any purpose by the Bidder other than for developing their response to it, and all reasonable efforts must be taken by the Bidder to ensure confidentiality of any information provided. This document and any other information of a confidential nature provided to the Bidder during the Request for Proposal (RFP) process are to be covered by the non-disclosure agreement signed between the SABS and the Bidder.

3. **Procedural compliance**

   3.1 Intent to respond

   An interested Bidder is required to advise the SABS of its intention to submit a proposal by completing and returning the "Intention to Respond" form (Appendix B) no later than **8ᵗʰ April 2026**. Should a party decide not to respond to this RFP, you are requested to continue to treat the information as confidential in perpetuity.

   3.2 Responsibility for costs

   Under no circumstances shall the SABS accept any responsibility whatsoever for any of the Bidder's costs associated with the preparation and/or submission of its Bid/Proposal, including any costs incurred by the Bidder prior to the signature, by both parties, of an agreement resulting from a successful bid.

   3.3 Amendments to the RFP

   Amendments to this document shall only be effective if agreed by the SABS and confirmed in a written addendum to the RFP. SABS reserves the right to modify the scope of this document at any time prior to and after the award of the tender.

   3.4 Submissions of bid proposals

   The Bidder is responsible for ensuring that the Bid/Proposal is submitted and delivered on time to **tenders.luvuyo@sabs.co.za** The SABS undertakes that the Bid Proposals shall be stored in a secure place, opened at the same time and not before the deadline for submission.

   Note: The above email address should only be used for submission of proposals. No clarity-seeking questions should be sent to this email address. (see 4.2 below)

   3.5 No obligation to proceed

   The SABS reserves the right to discontinue the RFP process at any time prior to the formation of the envisaged agreement and will give written reasons for the cancellation upon written request to do so. The SABS, its subsidiaries, shareholders, advisors, directors, employees, representatives including the SABS Representative shall not be liable for any losses, claims or damages of whatsoever nature or howsoever arising that may be sustained by a Bidder or any other person as a result of its participation or any amendment, termination or suspension of the process set out in this RFP or its exclusion from participating in the tender process at any point. It is expressed that SABS shall in no way be liable for any indirect/consequential damages, loss of profits, etc. suffered by the Bidder during the RFP process, award, negotiating and/or contracting phase.

After any cancellation of the tender process or the rejection of all tenders due to non-compliance with the thresholds, SABS may abandon the proposed work and services, have it performed in any other manner, or re-issue a similar invitation to tender at any time.

3.6 No contract

Bidders shall note that this RFP does not commit the SABS to any course of action resulting from the receipt of Bids/Proposals and the SABS may, at its discretion, reject any Bid/Proposal that does not conform to instructions and specifications that are contained herein or select a Bidder based upon its own unique set of criteria. SABS also reserves the right not to select a Bidder/award the tender. The SABS does not become bound by any obligations prior to the signature, by both party of an agreement - to be negotiated, resulting from a successful bid.

Nothing in this document shall be construed as a contract between the parties and no communication, whether verbal or written, by the SABS personnel or agents during this process shall create such a contract in respect of the requirements specified in this RFP.

SABS shall not be liable for any fees incurred due to any work done/services performed by the Bidder prior to signature, by both parties, of an agreement resulting from a successful bid.

3.7 Validity of proposals

The proposal shall remain valid for a period of one hundred and twenty (120) days from the submission date, after such proposal expires. SABS retains the right, but is under no obligation, to request Bidders to extend the validity periods of their proposals, prior to expiry thereof. Such a request, if there is any, shall be in writing. The Bidder is not obliged to extend the validity period.

3.8 Intellectual Property

The Bidder undertakes that the SABS retains ownership of all Intellectual property rights on all material and processes developed that relate to the service provided for and on its behalf by the Bidder. The Bidder undertakes to transfer all said Intellectual Property Rights, whether registered and / or unregistered, to SABS, including undertaking to sign all forms necessary to affect such transfer. Confirmation from the service provider, stating that SABS will retain full ownership of the intellectual property and source code related to the solution. Upon implementation, the bidder will transfer the source code and all related documentation to the SABS. The solution will reside on the SABS infrastructure, and ongoing support and maintenance materials will be handed over at the conclusion of the support period.

All data generated, processed, or stored through the ERP system—regardless of whether the system is proprietary or open-source—shall remain the **sole and exclusive property of the South African Bureau of Standards (SABS)**.The service provider shall not acquire any ownership or usage rights over SABS data beyond what is strictly necessary to perform the contracted services.

3.8.1. System Intellectual Property.
a) **Proprietary ERP (e.g. OEM):**
All intellectual property rights in the software, source code, configuration scripts, and documentation remain vested in the Original Equipment Manufacturer (OEM) and/or its licensor. SABS shall obtain a **perpetual, non-exclusive license to use the configured environment**, limited to its internal operations.
b) **Open-Source ERP (e.g. Odoo, ERP Next):** All intellectual property rights in the base open-source code remain subject to the applicable open-source license (e.g. LGPL, GPL, MIT). Customizations, configurations, integrations, and documentation developed specifically for SABS under this contract shall be **owned by SABS** upon acceptance and payment.

4. General Instructions

4.1   Assumptions

SABS has endeavored to provide sufficient guidance to inform Bidders' Bids/Proposals. However, it may be necessary to make some assumptions. Where assumptions have been made these must be documented in the Bid/Proposal. The SABS accepts no responsibility for assumptions made by the Bidder.

4.2   Requests for clarification/additional information

Requests for additional information, questions or issues fundamental to the quality or clarity of the response should be submitted using the 'Request for Proposal Enquiry' (Appendix N). Additional information will be provided at the discretion of SABS. SABS also reserves the right to provide the same information to all other interested Bidders. (Please refer to 4.3 below)

4.3   Contact information

All enquiries regarding this RFP must be e-mailed to Luvuyo.Tshabalala@sabs.co.za and Tshiwela.Madzaga@sabs.co.za

Bidders must not contact any other SABS personnel regarding this RFP as this may lead to disqualification of the bid. Also note that any canvassing by Bidders regarding this RFP will result in disqualification.

4.4   Timescale

The proposed timescales for the RFP process are indicated below.

Item	Milestone	Date
1	Date of RFP advertisement	17th March 2026
2	Appendix C, Non-disclosure Agreement/ Confidentiality Undertaking signed and submitted	8th April 2026
3	Appendix B, Intention to respond released and submitted	8th April 2026
4	Final Date for Bidders to submit consolidated requests for clarification (Questions) Questions to be sent to: Luvuyo.Tshabalala@sabs.co.za and Tshiwela.Madzaga@sabs.co.za	27th March 2026 at 16:00PM
5	SABS clarification. (No further clarification after this date)	31st March 2026 at 16:00 PM
6	Proposal Submission Date Proposals to be sent to: tenders.luvuyo@sabs.co.za	8th April 2026 at 11:00 AM
7	Evaluation of proposals	TBC
8	Awarding of Tender (Next BAC seating)	TBC

4.5   Management summary

This section should be submitted as a separate document. The information to be provided in the Management Summary shall include, but not be limited to the following items: Company profile of Completed 'Statement of Compliance' (Appendix K)

4.6   Presentations

SABS reserves the right to request bidders to present for clarification.

4.7   Clarification and inspections

SABS may submit clarification in writing on specific aspects of tender to obtain a better understanding of the bids received. This may also include possible inspections of the Bidder's premises at an agreed date and time.

4.8   Submitting a response

4.8.1   Due date

- Proposals/ Bids are to be submitted by closing date and time as stipulated on page 1.
- Proposals/ Bids must be submitted **electronically** to tenders.Luvuyo@sabs.co.za indicating the tender **reference number** and **description on the subject**. **Maximum size 14MB.**
- Proposals/ Bids must be submitted on **PDF Files** (compressed zipped folder if necessary).
- Proposals/Bids submitted **via a link and/or "we transfer"** **will not be accepted.**
- The responsibility for on-time submission rests entirely with the Bidders.
- **Late submissions will NOT be accepted.**

The above email address should only be used for submission of proposals. No clarity-seeking questions should be sent to this email address.

4.8.2 Proposal format

Each proposal shall include a detailed description of the Bidder's capabilities regarding the requirements set out in **Appendix A and Section 5.3** of the Mandatory Evaluation.

4.8.3 Central Supplier Database (CSD) Registration

Service providers and suppliers who wish to render services to SABS will no longer register at SABS directly. Suppliers will have to register on National Treasury Central Supplier Database (CSD) as per National Circular No 3 of 2015/6 – Central Supplier Database.

National Treasury will maintain the database for all suppliers for Government and its institutions; and All existing and prospective suppliers are requested to register on the CSD by accessing the National Treasury website at www.CSD.gov.za.

5. Evaluation

5.1 Returnable documents

Bidders must provide the following administrative compliance documents.
[TICK APPLICABLE BOX]

NO	APPENDIX	TICK
1	Appendix A Tender Requirements/ Scope of Work	
2	Appendix B Intention to Respond	
3	Appendix C SBD 4 Bidder's Disclosure	
4	Appendix D Signed Non-disclosure agreement	
5	Appendix E SBD 6.1 Preference points claim form in terms of the Preferential procurement Regulation 2022	
6	Appendix F Signed SABS Terms & Conditions	
7	Appendix G CSD Report / Proof of banking details for international suppliers	
8	Appendix H BBBEE/ Sworn affidavit	
9	Annexure I Quotation/ Fixed Rate	
10	Appendix J Management Summary (including Statement of Compliance)	
11	Appendix K Statement of Compliance	
12	Appendix L Page 2 of the RFP Document	
13	Appendix M Audited Financial Statements	
14	Appendix N Request for Proposal Enquiry	

5.2 Disqualifying criteria are as follows:

- Bidders who do not meet all the requirements as specified on the RFP document scope of work will not be evaluated any further.
- Bidders whose solution is encumbered by any Intellectual Property rights, whether registered and / or unregistered, including but not limited to Copyrights, Patents, Know-how, Registered Designs, Trade Secrets and the like, will not be considered for the bid.
- Bidders who make a misrepresentation on the above 2 points or any other material fact.

5.3 Tender Evaluation Process Important:

Instructions to Bidders:

- Each bidder must **clearly indicate** which module(s) or domain(s) they are bidding for by **ticking (✓)** the relevant box below.

- A **separate, complete submission** (technical proposal, resources, methodology, references, pricing) **must be provided per module** selected.

- Appointment under the Framework Agreement will be per **module** depending on capability and evaluation outcome.
- Appointment **does not guarantee exclusive work allocation.**

5.4. ERP Module Selection

Please tick the module(s) you are bidding or responding to:

No.	ERP Domain / Category	Sub-Modules / Functional Areas Covered	Bidder to Tick (✓)
1	**FINANCE**	General Ledger (GL), Accounts Payable (AP), Accounts Receivable (AR), Fixed Assets (FA), Expense Management, Tax Management, Cash Management, Costing / Cost Management, Budgeting & Planning (EPM), Financial Reporting & Analytics, Sales Order Management, Works Order Management.	
2	**SUPPLY CHAIN MANAGEMENT (SCM)**	Procurement Management, Supplier Management / Portal, Contract Management, Sourcing / Tender Management, Inventory, Receiving & Inspection, Logistics & Shipment Management, Product / Catalogue Management, Supply Chain Planning, SCM Reporting & Analytics	
3	**FACILITIES MANAGEMENT (EAM / FM)**	Facilities Asset Register, Preventive & Reactive Maintenance (Work Order Management), Project & CAPEX Management, Space & Occupancy Planning, Energy & Utilities Management, Health & Safety / Compliance, Service Provider & Contract Management, Asset Lifecycle Management, Facilities Reporting & Dashboards	
4	**HUMAN CAPITAL MANAGEMENT (HCM)**	Core HR, Recruitment & Onboarding, Performance & Talent Management, Learning & Development (LMS), Travel Management, HCM Reporting & Analytics	
5	**PROJECT & PORTFOLIO MANAGEMENT (PPM)**	Project Setup & WBS, Budgeting & Cost Control, Scheduling & Resource Management, Risk & Issue Management, Change & Scope Control, Project Billing, Project Dashboards & Reporting	
6	**CUSTOMER RELATIONSHIP MANAGEMENT (CRM)**	Customer Master Data & Segmentation, Lead & Opportunity Management, Client Onboarding & Registration, Quotation & Proposal Management, Order & Request Management, Customer Engagement & Communication Centre, Service Level & Complaint Management, Marketing & Campaign	

		Management, Customer Portal / Self-Service Platform, CRM Reporting & Analytics	
7	ENTERPRISE INTEGRATION & INTELLIGENCE LAYER	CIMS (Certification System), LIMS (Laboratory Information Management System), SharePoint (Document Management / ECM), SABSTAN (Standards Database), Webstore, Payroll Interface, SARS, Banks, CSD, Enterprise Data Warehouse (BI), Master Data Warehouse (MDW), Integration Services & Architecture, API Development, Middleware Configuration	
8	MASTER DATA WAREHOUSE (MDW)	Data Modelling, ETL Pipelines, Metadata & Data Quality Management, Governance Framework, Security & Access Control, MDW Analytics Integration	
9	LEARNING MANAGEMENT SYSTEM (LMS)	Course Administration, Learning Paths & Certifications, Integration with HCM, Learning Analytics, User Portal / Mobile Access, Content Migration, Reporting & Dashboards	
10	ENTERPRISE PERFORMANCE MANAGEMENT (EPM)	Planning & Budgeting, Forecasting & Scenario Modelling, Performance Scorecards, Financial Consolidation, Reporting & Analytics Integration	

Instructions to Bidders

1. **Select Module(s):** Tick (✓) each ERP module for which you are submitting a proposal. Bidders may select one or more modules.
2. **Submissions:** Each module selected must include independent technical covering:
   o Detailed implementation **methodology** and **approach**.
   o **Resource plan** with key personnel and CVs.
   o **OEM partnership or accreditation evidence**
   o **Relevant project references**.
   o **Pricing schedule** completed only for the module(s) ticked or selected above.
   o **Delivery timelines and milestones**.

5.5. Submission Format:

- Each module must be clearly labelled (e.g., *Module 1 – Finance, Module 2 – SCM,* etc.) within the overall bid evaluation package.

5.6   Framework Participation:

5.7 Appointment to the Framework provides eligibility for future Call-Off Orders within the selected modules for a period

5.8 Appointment per Module/Category

- Service providers will be appointed **per module** within the ERP programme (e.g., Finance, SCM, HCM, CRM, PPM, Facilities, and Integration Layer).
- A bidder may be appointed for **one or multiple modules**, subject to demonstrating capacity, technical capability, and relevant experience.

- Appointment under the Framework Agreement **does not guarantee exclusive allocation of work** for any module or category.
- The SABS reserves the right to issue **Call-Off Orders** for specific assignments within each module to one or more appointed service providers, based on performance, capacity, and fit-for-purpose criteria.

5.9. Evaluation per Module

- The **evaluation process will be conducted per module**, ensuring fair and transparent assessment of bidders' capabilities for each functional area.
- The evaluation will comprise **technical, functional, and financial assessments, demo,** conducted independently for each module/category.
- Bidders must **achieve the minimum qualifying score** for the specific module(s) applied for to be considered for inclusion in the Framework Agreement.
- Only those bidders that meet or exceed the **minimum threshold per module** will be considered eligible for appointment under that category.
- SABS reserves the right to appoint more than one qualifying service provider per module/category to ensure delivery continuity, competition, and risk mitigation.

5.10. Mandatory Bid Response Requirements

To ensure a consistent and fair evaluation process, the following submission requirements apply:

- **Module Selection**

  - Service providers must **clearly indicate** the module(s) and/or categories) for which they are submitting a proposal.
  - Module selection should align directly with the bidder's **technical expertise** and **OEM accreditation**

5.11. Framework Participation Commitment

- By submitting a bid, the service provider acknowledges that **appointments to the Framework** constitute eligibility for future Call-Off Orders, based on SABS needs and project readiness.

5.12. Outcome of Evaluation
- Successful bidders will be appointed **to the SABS ERP Framework Agreement** for a period of **60 months**.
- Appointed service providers will become **eligible for module-specific Call-Off Orders**, subject to project prioritization and budget availability.
- SABS reserves the right to allocate work to multiple providers within the same module or functional category based on performance and capacity requirements.

STAGE 1: MANDATORY REQUIREMENTS

The following **Mandatory Eligibility Requirements** must be met at the time of bid submission. Bids that do not fully comply with the mandatory requirements will be disqualified and will not be considered for further evaluation. **Mandatory Eligibility Requirements (Pass/Fail).**

Mandatory Requirement	Description	Evidence Required	Evaluation Method
OEM Authorisation	The bidder must provide valid OEM authorisation or equivalent evidence confirming that the bidder is authorised to supply, implement, or support the proposed solution.	OEM certificate, OEM authorisation letter, or official reseller/partner certification issued by the OEM.	Pass / Fail
Financial Stability	The bidders must submit three (3) years signed audited or independently reviewed annual financial statements in accordance with the Companies Act 2008 for evaluation not limited to solvency, liquidity, pledges and contingent liabilities. AFS for bidders who are not required by the Companies Act to have their AFS audited or independently reviewed, must be certified for accuracy and correctness by the duly authorised Senior Official in Finance and Accounting Officer / Director in which case the authorisation must be attached.	Audited **OR** independently reviewed **OR** certified by duly authorised official together with the Accounting Officer, financial statements for the past three (3) financial years, whichever is applicable, in accordance with the Companies Act 2008.	Pass / Fail
Requirement	POPIA-Aligned Requirement Description	Evidence Required	Evaluation
POPIA-Compliant Processing and Hosting of Personal Information	The bidder must confirm that the proposed solution will process, store and secure personal information in compliance with the Protection of Personal Information Act, 2013 (POPIA), including the implementation of appropriate technical and organisational security safeguards to protect personal information against loss, damage, unauthorised destruction, or unlawful access or processing in accordance with Section 19 of POPIA. The bidder must also disclose the location of data hosting and processing infrastructure, including whether the solution	Written confirmation indicating POPIA compliance and specifying the proposed hosting model and location of data processing and storage.	Pass / Fail

	will be hosted on premises within the Republic or through cloud infrastructure.		
Cross-Border Personal Information Transfer Compliance (if applicable)	Where personal information may be transferred outside the Republic of South Africa, the bidder must confirm that such transfers will comply with Section 72 of POPIA, including ensuring that the recipient of the personal information is subject to a law, binding corporate rules, or binding agreement that provides an adequate level of protection for personal information.	Written declaration confirming that any cross-border transfers will comply with Section 72 of POPIA and that appropriate safeguards are in place.	Pass / Fail
Operator Agreement / Data Processing Agreement Capability	The bidder must confirm the ability to enter into a written Operator Agreement (Data Processing Agreement) with SABS, where SABS acts as the Responsible Party and the bidder acts as an Operator, governing the processing of personal information in accordance with Sections 20 and 21 of POPIA.	Written confirmation within the bid proposal that the bidder will enter into an Operator/Data Processing Agreement with SABS governing the processing of personal information.	Pass / Fail
POPIA Contractual Compliance	The bidder must confirm that contractual arrangements will include provisions ensuring that personal information relating to identifiable natural persons and, where applicable, existing juristic persons is protected and processed in accordance with the requirements of POPIA, including obligations relating to confidentiality, lawful processing, security safeguards, and breach notification.	Written confirmation within the bid proposal.	Pass / Fail

All compulsory items must be met to achieve compliance under POPIA and data residency evaluation criteria.

Evaluation Notes

- Evaluation should be supported by documentary evidence submitted in the bid and verified during due diligence or clarification stages.

STAGE 2: FUNCTIONALITY EVALUATION

Bidders will be evaluated on functionality based on the criteria set out below. Only bidders that achieve the **minimum functionality threshold of 70 points out of 100** will proceed to the next stage of evaluation.

In addition, bidders must score at least **25/30 on integration capability and technical compatibility to pass to the next stage**

Failure to meet the overall threshold or the minimum critical criterion (threshold **25/30 on integration capability and technical compatibility)** will result in the bidder being deemed **non-responsive for functionality**.

Functionality Evaluation Summary

No.	Functionality Criterion	Weight
1	Methodology with Detailed Project Plan, Transition and Support Approach	20
3	Integration Capability and Technical Compatibility	30
4	Track Record of Similar Projects Executed	25
5	Key Resources	25
	Total	**100**

- The functional requirements listed below must be adequately addressed to demonstrate responsiveness, which is prerequisite for qualifying for the subsequent evaluation phase.
- This is being done to assess each bidder's capacity to effectively complete the contract in accordance with the requirements.
- This means that the submission must: (i) directly respond to each requirement listed, (ii) demonstrate understanding and capability to meet those requirements, (iii) provide sufficient detail or evidence to show compliance.
- After this stage, the bids will be disqualified and will not be able to continue with price scoring if they do not meet the threshold of 70%

Functionality will be measured on a scale of 1-5. Very poor:1, Poor:2, Average:3, Good:4, Excellent:5

2. Detailed Functionality Evaluation Criteria

2.1 Methodology with Detailed Project Plan, Transition and Support Approach

SABS aims to generate a working solution quickly and ensure that high-priority functionalities are delivered early.

Prospective bidders are therefore required to provide a detailed implementation methodology, project plan and transition approach demonstrating how the scope of work will be executed for the module(s) being bid for.

No.	Criteria	Scale	Weight

No.	Criteria	Scale	Weight
1	**Methodology with Detailed Project Plan, Transition and Support Approach**. The bidder must provide a detailed implementation methodology and project plan aligned to the module(s) being bid for. The methodology will be deemed sufficient where it addresses all of the following: **A.** Project Management Implementation Plan with clear phases, milestones, governance, deliverables, risks and mitigation. **B.** Business Requirements and Design Approach. **C.** Solution Configuration, Testing Approach, Data Migration and Cut-over Strategy. **D.** Change Management and End User Training Approach. **E.** Maintenance and Support including SLAs, response times, deployment support and disaster recovery approach.	• All five requirements fully addressed (A, B, C, D and E) = 5. • Four requirements addressed = 4. • Three requirements addressed = 3. • Two requirements addressed = 2. • One requirement addressed = 1. • No adequate methodology provided = 0	**20**

2.2 Integration Capability and Technical Compatibility

The bidder must demonstrate the ability of the proposed solution to integrate with existing SABS applications and external systems relevant to the module(s) being bid for.

No.	Criteria	Scale	Weight
2	**Integration Capability and Technical Compatibility**. The bidder must demonstrate integration capability with relevant SABS and external platforms, including where applicable CSD and banks in South Africa. The response must address the following: **A.** Proposed integration architecture and approach. **B.** Experience with APIs, middleware, batch and real-time integration. **C.** Ability to integrate with identified SABS applications and external services. **D.** Data exchange controls, validation and reconciliation mechanisms. **E.** Security controls for integration interfaces.	All five requirements fully addressed = 5. Four requirements addressed = 4. Three requirements addressed = 3. Two requirements addressed = 2. One requirement addressed = 1. No adequate response provided = 0	**30**

2.3 Track Record of Similar Projects Executed

The bidder must provide evidence of successful delivery of similar projects aligned to the module(s) being bid for.

No.	Criteria	Scale	Weight
3	**Track Record of Similar Projects Executed**. The bidder must provide a minimum of three contactable client reference letters on client letterhead for similar contracts successfully executed in the past ten (10) years. For ERP-related bids, the reference letters must demonstrate implementation of the proposed ERP module bided for , where applicable. Each reference letter must include client name; letterhead; contact person and contact details; scope of work and modules implemented; confirmation of satisfactory completion without breach due to poor or non-performance; whether the bidder is recommended; and signature by a duly authorised official.	No similar work / no reference letters = 0. One reference letter = 1. Two reference letters = 2. Three reference letters = 3. Four reference letters = 4. Five or more reference letters = 5	25

2.4 Key Resources

The bidder must provide the proposed project team for the module(s) being bid for. The proposal must clearly indicate the names of the resources, their allocated roles, qualifications, certifications and relevant experience.

Scoring for each role shall be as follows:

Key Resources and Weighting

No.	Role	Weight	Minimum Requirements for Highest Score (5)	Means of Verification
4.1	Project Manager	4	Minimum 5 years' experience in ERP or enterprise system project management and implementation; B Degree or National Diploma (NQF 6) in Project Management, IT, Information Systems or related field; PMP, PRINCE2 or equivalent certification	Detailed CV; certified qualifications; certified professional certification
4.2	Integration Lead	3	Minimum 3 years' experience in systems integration design and development; B Degree or National Diploma (NQF 6) in IT, Computer Science or related field	Detailed CV; certified qualifications
4.3	Information Security Lead	3	Minimum 2 years' experience in information security, cybersecurity and risk management in enterprise systems; B Degree or National	Detailed CV; certified qualifications

			Diploma (NQF 6) in Information Security, Computer Science or related field	
4.4	POPIA / Data Protection Lead	2	Minimum 2 years' experience in privacy, data protection, POPIA compliance, information governance or legal compliance relating to information systems; relevant qualification in Law Information Governance, Compliance or Risk management or related field	Detailed CV; certified qualifications
4.5	Technical Lead	3	Minimum 3 years' experience in application design, systems architecture and enterprise solution implementation; B Degree or National Diploma (NQF 6) in Computer Science, Software Engineering or related field	Detailed CV; certified qualifications
4.6	Testing Lead	3	Minimum 3 years' experience in testing management, test planning, defect management and user acceptance testing for enterprise systems; B Degree or National Diploma (NQF 6) in Information Systems, Computer Science or related field	Detailed CV; certified qualifications
4.7	Data Migration Lead	3	Minimum 3 years' experience in data management and migration for enterprise systems; B Degree or National Diploma (NQF 6) in Information Systems, Data Science or related field	Detailed CV; certified qualifications
4.8	Accounting / Functional Lead	2	Minimum 3 years' experience in ERP finance, accounting or functional systems support relevant to the module; B Degree or National Diploma (NQF 6) in Accounting, Finance or related field	Detailed CV; certified qualifications
4.9	Change Management Lead	2	Minimum 3 years' experience in organisational change management, stakeholder engagement and end-user adoption for enterprise programmes; B Degree or National Diploma (NQF 6) in Organisational Development, Human Resources or related field	Detailed CV; certified qualifications
	Total	25%		

4. Minimum Functionality Threshold

The minimum threshold for functionality shall be as follows:

Requirement	Threshold
Overall functionality score	**70 out of 100**
Integration Capability and Technical Compatibility	**24 out of 30**

Any bidder that fails to achieve the above thresholds shall be deemed **non-responsive for functionality** and shall not proceed to the next stage of evaluation.

N/B

- **BIDDERS WHO MEET THE MINIMUM THRESHOLD OF 70% ON FUNCTIONALITY WILL BE EVALUATED FURTHER ON PREFERENTIAL POINT SYSTEM – PRICING AND SPECIFIC GOALS.**

STAGE 4: ERP DEMONSTRATION SCENARIO EVALUATION SCRIPT

Purpose

The purpose of the demonstration is to assess the bidder's ERP system capability to support **core business processes of the organisation through live system demonstration**.

All bidders will be required to demonstrate the **same scenarios** using their proposed ERP solution.

ERP Demonstration Scenarios

No	Scenario	Demonstration Requirements	Evaluation Focus
1	**Procure-to-Pay Process**	Create requisition → approval → purchase order → goods receipt → supplier invoice → payment	Workflow automation, approvals, audit trail
2	**Budget Control and Financial Posting**	Create budget → approve budget → process transaction → system checks budget availability	Financial control and compliance
3	**Asset Management Lifecycle**	Register asset → depreciation calculation → asset transfer → disposal	Asset tracking and financial integration
5	**Reporting and Dashboard**	Generate financial report and management dashboard	Data analytics and reporting capability
6	**Security and Access Control**	Demonstrate role-based access control and audit trail	Data security and governance
7	**Order to Cash**	Customer onboarding incl credit assessment (new customers) / financial clearance (existing customers) – create quotation – sales order – tax invoice – customer receipt	Workflow automation (approvals), audit trail and financial controls, credit checks and customer clearance, multi-currency processing, system integration, exception handling (credit holds, returns, etc)

Scoring Scale

Score	Meaning
5	Fully demonstrated and exceeds requirements
4	Meets requirements with minor gaps
3	Meets minimum requirements
2	Partially demonstrated
1	Not demonstrated

Evaluation Score Sheet

Scenario	Weight	Score	Weighted Score
Procure-to-Pay	20%		
Budget Control	15%		
Asset Management	15%		
Reporting Dashboard	20%		
Security	15%		
Order to Cash	15		
Total	**100%**		

Demonstration Rules for Bidders
1. Each bidder will be allocated **equal demonstration time**.
2. Demonstrations must be conducted using the **actual ERP system** proposed.
3. Demonstrations must follow the **provided scenarios**.
4. No pre-recorded videos or slide-only demonstrations will be accepted.
5. Evaluators may request clarification during the demonstration.

5.4 Preferential point system – Pricing and SPECIFIC GOAL

Only Bidders who submitted quotations as per scope of work and met mandatory requirements will be evaluated further on 90/10 preference points system of 2022. (Pricing and **SPECIFIC GOAL**)

6. Feedback on Proposals

Once the recommendation to the Bid Adjudication Committee (BAC has been approved, the successful and unsuccessful bidder(s) will be notified in writing.

Successful bidder/s will be issued with a notification letter. Such notification does not constitute an agreement. The award is wholly subject to the successful Bidder entering into a duly signed contract with SABS.

7. Contracting

- The South African Bureau of Standards (SABS) seeks to appoint more than one service provider under a Framework Agreement for the design, development, configuration, testing, deployment, training, support, and maintenance of an integrated Enterprise Resource Planning (ERP) Solution.

- The ERP solution will be delivered through a modular and phased implementation approach to enable progressive realization of the full system capabilities over a 60-month period.

- Implementation of the ERP solution will follow a phased and/or modular approach, beginning with the critical and high-priority modules, with subsequent phases activated through specific call-off orders as and when required.

- This framework of appointment does not create any expectation on the part of SABS to utilize the appointed service providers for the entire scope of services. SABS reserves the right to limit, vary, or not utilize portions of the framework scope at its discretion, based on operational requirements.

- Successful bidder(s) will be required to enter a contract with the SABS. A formal framework Agreement will be signed with the successful bidders and SABS further reserves the right to amend,

alter or delete clauses relating to, but not limited to insurance, indemnity, undertaking, guarantees, Intellectual Property, service levels and / or tax compliance.

- SABS shall not be liable for any costs expended by the bidder prior to any formal agreement being signed. **It is therefore imperative that NO SERVICES are rendered prior to the formal agreement becoming effective.**

7.1. Purpose of the Framework

- The purpose of establishing the ERP Framework Panel is to create a multi-vendor contracting mechanism that allows the South African Bureau of Standards (SABS) to appoint qualified, accredited, and experienced ERP implementation service providers to deliver various components of the SABS Enterprise Resource Planning (ERP) Programme in a phased and modular manner.

- This framework ensures:
  - ✓ Continuity, competition, and flexibility in the ERP delivery model.
  - ✓ Compliance with PFMA, Treasury Regulations, and National Treasury Instruction Note 3 of 2021/22 (Framework Agreements);
  - ✓ Alignment with SABS's Digital Transformation Strategy (Vision 2026-2031); and
  - ✓ Standardized governance, risk management, and reporting under the SABS Programme Management Office (PMO).

7.2. Objectives of the Framework Panel

- Enable SABS to rapidly engage accredited ERP implementation partners for specific modules, phases, or streams without re-tendering.
- Ensure delivery continuity by having multiple pre-qualified providers per category.
- Allow call-offs to be issued for specific work packages aligned to approved budgets.
- Facilitate integration and coordination across ERP modules, ensuring a unified system landscape.
- Multi-Service Provider Model (maximum 2 Providers per Category/Module)

  - ✓ Multiple qualified and accredited service providers will be appointed under each category of ERP implementation to **ensure flexibility, competition, and continuity** in the delivery of services.
  - ✓ Each service provider will form part of a **pre-approved ERP Implementation Framework Panel**, covering specific functional and technical categories
  - ✓ The appointment of a service provider to the framework **does not guarantee exclusive allocation of work**. Work allocation will depend on:
  - ✓ Capability, experience, and OEM accreditation relevant to each call-off.
  - ✓ Proven capacity and performance in preceding assignments.
  - ✓ Cost competitiveness and technical evaluation at call-off stage.

✓ This model maintains a healthy **competitive environment** among the appointed service providers and **ensures continuity** in the event of vendor underperformance or withdrawal.

- The ERP implementation will be executed through a phased and modular approach, with specific modules activated via call-off orders as and when a business need is identified and funding becomes available.
- Implementation will commence with high-priority and critical modules, sequenced strategically to ensure continuity, system integration, and minimal disruption to operations, progressing until all required modules have been successfully implemented.

7.2. Financial Commitment and Call-Off Activation.

- The **award of this framework contract does not constitute a financial commitment** by the South African Bureau of Standards (SABS).
- The inclusion of a service provider on this framework **shall not create any expectation of guaranteed work or payment**.
- All project activities, deliverables, and associated costs will be initiated **only through formal call-off orders**, which will be **subject to confirmation of budget availability and internal approvals** at the time of activation.
- No work may commence, and no costs shall be incurred or claimed, **without a duly authorized call-off order** issued in writing by the SABS.

7.3. No Obligation Clause

The South African Bureau of Standards (SABS) reserves the right, at its sole discretion, not to utilize the framework agreement in full or in part.

SABS may elect to:

- Activate selected modules or components of the scope only.
- Defer implementation phases based on business priorities and funding; or
- Procure specific ERP-related services through alternative mechanisms where it is deemed more appropriate or cost-effective.

The appointment of the service provider to this framework does not guarantee any minimum volume of work, revenue, or expenditure over the contract period. Engagements will occur strictly on an "as-and-when required" basis through approved call-off orders supported by confirmed budgets.

7.4. Framework Governance and Control.

The implementation and administration of this Framework Agreement shall be governed by the **SABS Programme Management Office (PMO)** in collaboration with **Supply Chain Management (SCM)** and the **ICT Division**, under the delegated authority of the **Executive.**

All call-offs under the framework will follow the process below to ensure compliance, transparency, and financial control:

- **Identification of Need**

    - ✓ The PMO, together with the relevant business unit and ICT, will identify and define the specific ERP module or service required.
    - ✓ The need must align with approved strategic and operational plans.

- **Scope and Budget Confirmation**

    - ✓ The PMO will develop or update the detailed scope of work for the identified module.
    - ✓ Budget availability must be confirmed in writing by **Finance** before any call-off order is initiated.

- **Internal Approvals**

    - ✓ Each call-off will be submitted to **the** delegated executive for approval prior to activation.

- **Call-Off Order Issuance**

    - ✓ SCM will issue a **formal call-off order** (Purchase order) referencing the approved scope, cost, deliverables, and applicable framework pricing.
    - ✓ The call-off order will constitute the legally binding instruction for the service provider to commence work.

- **Monitoring and Reporting**

    - ✓ The PMO will oversee implementation, track progress, and ensure adherence to governance, timelines, and deliverables.
    - ✓ Regular reports will be submitted to EXCO and the Project Steering Committee, covering progress, risks, and budget utilization.

- **Payment and Acceptance**

- ✓ Payments will be made strictly against verified milestones and deliverables as outlined in the call-off order.
- ✓ Acceptance certificates must be signed by the PMO and the Project Owner before any payment is processed.

This governance process ensures that all call-offs under the ERP Framework are **budget-secured, performance-monitored, and audit-compliant**, safeguarding both financial and operational integrity

8. CALL-OFF ALLOCATION AND GOVERNANCE MECHANISM

The Call-Off mechanism defines the structured process by which SABS will allocate specific ERP implementation assignments to service providers appointed under the Framework Agreement. The mechanism ensures **fairness, transparency, performance-based allocation**, and strict alignment with **PFMA**, **National Treasury**, and **SABS project governance frameworks**.

8.2 Purpose of the Call-Off Mechanism

The Call-Off mechanism is intended to:

- Enable **flexible utilization** of multiple appointed service providers under the Framework.
- Ensure that each assignment or work package is allocated based on **capacity, expertise, and performance**.
- Maintain **continuity of delivery** across all ERP modules while managing risk; and
- Uphold the principles of **accountability, transparency, and value-for-money**.

8.3 Call-Off Process Overview

The allocation of work under the Framework will be managed through **Call-Off Orders** issued by the SABS **Programme Management Office (PMO)** in collaboration with the **ICT Division** and the relevant **Business Process Owner**.

Stage	Activity / Description	Responsible Party
1. Need Identification	PMO identifies a specific requirement within an ERP module (e.g., Finance, SCM, HCM, CRM, Facilities, PPM, or Integration).	Business Unit / PMO
2. Scope Confirmation	PMO validates the scope, budget availability, dependencies, and timing.	PMO / ICT / Finance

3. Call-Off Request Issuance	PMO issues a formal **Call-Off Request (TOR)** to the qualified service providers within the relevant module category.	PMO / SCM
4. Quotation / Proposal Response	Service providers respond with resource profiles, timelines, and costing aligned with Framework rates.	Service Providers
5. Technical Review & Selection	PMO and ICT evaluate response based on capacity and alignment with ERP architecture.	PMO / ICT / SCM
6. Approval & Award	Recommendation submitted to relevant governance committee (Project Steering Committee -recommend for approval by the accounting officer.	Project Steering Committee and Accounting Officer
6. Service Level Agreement	Develop service level agreement for the specific call off /Module	legal
7. Call-Off Order Issuance	Formal Call-Off Order (Purchase Order or Service Level Order) is issued to the selected provider.	SCM
8. Delivery & Oversight	Service provider executes the assignment under PMU's governance and monitoring framework.	Service Provider / PMO/ICT
9. Close-Out & Performance Review	Post-delivery review conducted to evaluate outputs, quality, and lessons learned.	PMU / ICT / Business Owner

8.4. Allocation Principles

1. **Performance-Based Allocation**
   o Providers demonstrating consistent delivery quality, compliance, and timeliness will be prioritised for subsequent Call-Offs.
   o Non-performing providers may be suspended or removed from the Framework following performance review.

2. **Rotation & Fair Opportunity**
   o For modules with multiple appointed service providers, allocation will be rotated equitably based on readiness, capacity, and prior workload distribution.

3. **Specialisation Alignment**
   o Call-Offs will align with each provider's **approved module(s)** and **specialisation area** (e.g., Finance, HCM, or Integration).

4. **Budget Compliance**
   - No Call-Off shall be issued without confirmed budget availability and approval by the relevant financial authority (per SABS Delegation of Authority Framework).
5. **Governance Approval**
   - All Call-Offs are subject to **PMU and SCM joint governance review** prior to final award to ensure adherence to Framework terms.

8.5. Call-Off Documentation

Each Call-Off will include the following documents:

- **Terms of Reference (TOR)** – detailing scope, deliverables, duration, and dependencies.
- **Resource Plan** – identifying key personnel, roles, and level of effort.
- **Pricing Schedule** – derived from Framework unit rates or deliverable-based costing.
- **Milestone & Payment Schedule** – linked to measurable outputs and acceptance criteria; and
- **Governance & Reporting Plan** – outlining communication, quality assurance, and escalation protocols.

8.6. Governance Structure and Oversight

Governance of the Framework and Call-Off process will be maintained through existing SABS structures:

Governance Body	Role and Responsibilities
PMU (Programme Management Unit)	Strategic oversight of ERP Framework; Call-Off initiation, technical evaluation, progress monitoring, and reporting.
ICT Division	Enterprise architecture assurance, system integration oversight, and technical validation.
SCM (Supply Chain Management)	Compliance with PFMA and Treasury Regulations; Call-Off order issuance and contract administration.
Business Process Owner / Functional Division	Validation of functional requirements, deliverable acceptance, and user testing.
ERP Steering Committee / EXCO	Approval of major Call-Off allocations, monitoring of performance reports, and escalation resolution.
Audit & Risk Committee (where applicable)	Independent assurance on compliance and governance controls.

8.7. Performance Management and Quality Assurance

- **Performance Reviews** will be conducted after completion of each Call-Off, assessing delivery quality, timeliness, and stakeholder satisfaction.
- **Quarterly Framework Performance Reports** will be compiled by the PMU summarizing all Call-Off activities, spend, and outcomes per service provider.
- **Non-performance penalties or exclusion** may apply where service providers fail to meet contractual or quality standards.
- **Knowledge Transfer** is mandatory at the end of each Call-Off to ensure skills retention within SABS's ICT and PMU teams.

8.8. **Governance Assurance and Reporting**

- All Call-Offs will be **registered, tracked, and reported** through the PMU's Enterprise Project Management System (EPMS).
- Reports will be submitted monthly to the **ICT Steering Committee** and quarterly to **EXCO and the Board Audit & Risk Committee**.
- PMU will maintain a **central Call-Off Register**, recording approved budgets, provider allocations, and completion statuses.

8.9. **Review and Adjustment of the Framework**

- SABS reserves the right to **review and update** the Framework Agreement annually to reflect organisational priorities, performance outcomes, and system maturity.
- New modules or integration requirements may be added through **formal addenda** to the Framework, subject to SCM and governance approval.

9. **POPIA Implementation & Contractual Compliance Requirements**

The successful bidder shall ensure full compliance with the **Protection of Personal Information Act (POPIA)** throughout the duration of the contract.

Where governance artefacts are not required at bid submission stage, the successful bidder shall implement the following **POPIA compliance deliverables during project implementation and prior to system go-live**.

Ref	Implementation Requirement	POPIA-Aligned Requirement Description
P1	**Personal Information Processing Flow Mapping**	The successful bidder, acting as an Operator in terms of POPIA, shall document and provide data flow diagrams illustrating the processing of personal information, including the collection, recording, organisation, storage, retrieval, use, dissemination, transmission, and deletion of personal information within the system and its interfaces. These diagrams must support SABS in

		demonstrating compliance with the conditions for lawful processing of personal information under POPIA.
P2	**Cross-Border Personal Information Transfers and Data Residency**	Where the solution involves cross-border transfers of personal information or cloud hosting outside the Republic of South Africa, the bidder shall ensure compliance with Section 72 of POPIA. The bidder shall clearly disclose the location of data hosting, processing and storage, including any use of cloud infrastructure or external data centres, and confirm that appropriate safeguards are in place to ensure an adequate level of protection for personal information processed outside the Republic.
P3	**Records of Personal Information Processing Activities**	The successful bidder shall support SABS in maintaining records of processing activities relating to personal information processed within the system, including categories of data subjects, categories of personal information processed, purposes of processing, recipients of personal information, and retention considerations, in support of POPIA accountability and transparency obligations.
P4	**POPIA Compliance Monitoring and Data Governance Controls**	The system shall provide mechanisms that enable SABS to conduct ongoing monitoring of compliance with POPIA, including the generation of audit logs, access records, monitoring reports, and governance controls necessary for internal compliance oversight and data protection audits conducted by the Information Officer or authorised governance structures within SABS.
P5	**Data Subject Participation Rights Enablement**	The bidder shall demonstrate that the solution enables SABS to facilitate the exercise of data subject rights in terms of POPIA, including the ability to process requests for access, correction, deletion, objection to processing, and consent management where applicable, and to maintain records of such requests and responses.
P6	**Operator and Sub-Operator Compliance**	The bidder shall disclose all operators, subcontractors, cloud providers, or other third parties involved in the processing of personal information and shall provide assurance that such parties are contractually bound to process personal information only with the knowledge or authorisation of SABS and subject to confidentiality and security obligations, in accordance with Sections 20 and 21 of POPIA.
P7	**Security Safeguards and Personal Information Breach Notification**	The bidder shall implement appropriate technical and organisational security safeguards to protect personal information against loss, damage, unauthorised destruction, unlawful access or processing, in accordance with Section 19 of POPIA and recognised security standards such as ISO 27001. The bidder must

		also maintain documented procedures for the identification, reporting, and notification of security compromises, enabling SABS to comply with its obligations under Section 22 of POPIA.
P8	**POPIA Compliance Framework**	The bidder shall submit an approved POPIA Compliance Framework in accordance with the Protection of Personal Information Act No. 4 of 2013 and Regulation 4 of the Regulations Relating to the Protection of Personal Information, 2018. The framework must address the eight conditions for lawful processing of personal information, including governance arrangements, accountability mechanisms, and security safeguards aligned with recognised information security standards such as ISO 27001.
P9	**Personal Information Impact Assessment (PIIA)**	The bidder shall demonstrate capability to support SABS in conducting a Personal Information Impact Assessment (PIIA) prior to system implementation or processing activities that may impact the protection of personal information, in accordance with POPIA accountability requirements.
P10	**Transfer of Special Personal Information**	Where the processing or transfer of special personal information to a third party outside the Republic may occur, the bidder shall ensure compliance with Section 57(1) of POPIA, including prior authorisation from the Information Regulator where applicable.
P11	**PAIA Manual Compliance**	The bidder shall demonstrate compliance with the Promotion of Access to Information Act (PAIA), 2000, including confirmation that the bidder has developed and maintains a PAIA Manual as prescribed by Sections 14 and 51 of PAIA, as amended.
P12	**Information Officer Registration**	The bidder shall provide proof that its Information Officer and/or Deputy Information Officer is registered with the Information Regulator in accordance with the requirements of POPIA.
P13	**Proof of Adequate Data Protection Measures**	The bidder shall provide evidence demonstrating that any entity receiving personal information outside the Republic is subject to a law, binding corporate rules, or binding agreement that provides an adequate level of protection for personal information, as required under Section 72 of POPIA. SABS reserves the right to request such proof prior to contract award.

9.1. Implementation Timeline Clause

The successful bidder shall ensure that all POPIA implementation requirements listed above are fulfilled **within ninety (90) days of contract award and prior to system go-live**, unless otherwise agreed with SABS. Failure to comply with these requirements may constitute **contractual non-compliance** and may result in remedial action in accordance with the terms of the contract.

The Implementation Partner shall be responsible for the design, configuration, and deployment of ERP integrations (Integration Cloud and related APIs), in accordance with the integration strategy, technical standards, and governance guidelines provided by the PMU and approved by SABS ICT. Refer to Appendix A for a detailed scope of work.

The Implementation Partner (IP), as the OEM-accredited, is responsible for the design, configuration, integration, testing, and deployment of the ERP solution components assigned to them through call-offs under the SABS ERP Framework.

The IP will ensure that each module is implemented according to the approved **Enterprise Architecture Blueprint**, the **Integration Strategy** and SABS ICT governance standards.

1. Scope of Responsibility (Per ERP Module)

The IP's role applies to each ERP module allocated under a call-off

- **Finance**
- **Supply Chain & Procurement (SCM)**
- **Human Capital Management (HCM)**
- **Customer Relationship Management (CRM)**
- **Project & Portfolio Management (PPM)**
- **Facilities & Asset Management/Enterprise Asset Management / EAM**
- **Enterprise Performance Management**
- **Learning Management**
- **Master Data warehouse**

For each module, the implementation Partner will perform both **functional configuration** and **ERP-side integration** as described below.

ERP Domain / Category	Sub-Module / Functional Area	Description / Key Capabilities	Typical Integrations / Connected Systems
FINANCE	General Ledger (GL)	Chart of Accounts, journals, intercompany, consolidation, close management	SCM, Projects, Payroll, CIMS, LIMS, SABSTAN
	Accounts Payable (AP)	Supplier invoices, payments, 3-way match, vendor settlements	Procurement, SCM, Projects, SharePoint

			(invoice docs), SABSTAN
	Accounts Receivable (AR)	Customer billing, receipts, revenue recognition, Collections	CRM, CIMS, LIMS, Treasury
	Cash Management (CM)	Bank reconciliation, cash forecasting, liquidity tracking	AP, AR, Treasury, Banks, SABSTAN
	Fixed Assets (FA)	Asset creation, depreciation, revaluation, disposal	Procurement, Projects, Facilities, SCM
	Expense Management	Employee expenses, travel reimbursements, approvals	HCM / Payroll, AP
	Tax Management	VAT, Withholding, Customs Duty	AP, AR, SCM, CIMS
	Budgeting & Planning (EPM)	Budget formulation, forecasting, scenario planning, variance analysis	GL, SCM, Projects, HR, SABSTAN
	Costing / Cost Management	Define costing methods (standard, actual, absorption); integrate with inventory, projects, and manufacturing	
	Financial Reporting & Analytics	Management / statutory reports, dashboards	PMU dashboards, SharePoint, Data Warehouse
SUPPLY CHAIN MANAGEMENT (SCM)	**Procurement Management**	Requisitions, POs, supplier onboarding, invoice matching	Finance (AP, GL), Projects, CIMS
	Supplier Management / Portal	Supplier registration, qualification, performance Tracking	Finance (AP), Procurement, CSD
	Contract Management	Supplier/service contracts, renewals, SLA compliance	Legal, Finance, SharePoint
	Sourcing / Tender Management	RFQ/RFP creation, evaluation, Awarding	SCM, Supplier Portal, SharePoint

	Inventory Management	Stock levels, warehouse, replenishment	Procurement, Projects, Finance, LIMS
	Receiving & Inspection	Goods receipt, inspection, non-conformance handling	Procurement, Inventory, Quality, LIMS
	Logistics & Shipment Management	Shipment scheduling, delivery tracking, transport cost Management	Procurement, Inventory, Projects
	Product / Catalogue Management	Item catalogues, product lifecycle, specification changes	Procurement, LIMS, CIMS, SABSTAN
	Supplier Collaboration & Performance	Supplier KPIs, SLA tracking	SCM, Finance
	Supply Chain Planning	Forecasting, demand/supply Planning	Inventory, Finance, Projects
	Asset & Capital Procurement	CAPEX procurement, automatic asset creation	Finance (FA), Projects, Facilities
	SCM Reporting & Analytics	Spend analysis, KPIs, supplier Scorecards	SharePoint, Data Warehouse
FACILITIES MANAGEMENT (EAM / FM)	**Facilities Asset Register**	Central repository of buildings, labs, plants, and utilities	Finance (FA), SCM, Projects
	Preventive Maintenance Management	Scheduling and tracking of planned maintenance (HVAC, electrical, lifts, etc.)	Projects, Finance (OPEX), SCM (spares)
	Reactive Maintenance / Work Order Management	Logging, prioritizing, and resolving ad-hoc maintenance tasks	Helpdesk, SCM (spares & services), Finance
	Project & CAPEX Management	Tracking refurbishment / construction projects, budgets vs actuals	Finance (GL / PPM), SCM, BI
	Health & Safety / Compliance Management	OHS audits, incidents, contractor compliance	HR (SHE), BI, SharePoint

	Service Provider & Contract Management	SLA monitoring of cleaning, security, maintenance vendors	SCM, Finance (AP)
	Asset Lifecycle Management	Full asset lifecycle from procurement → maintenance → disposal+ Assets Verification.	Finance (FA), Projects, SCM
	Facilities Reporting & Dashboards	Downtime, utilization, CAPEX spend, OHS compliance	BI dashboards, Data Warehouse
HUMAN CAPITAL MANAGEMENT (HCM)	**Core HR / Employee Master Data**	Central employee profiles, org structures, positions	Finance (Payroll), BI, Projects
	Talent Management	Succession planning, competency tracking	HR, BI (KPI dashboards)
	Learning & Development	Training plans, courses, certifications, competencies Matrix	HR, BI, SharePoint
	Travel Management	Travel requests, approvals, advances, expense claims	Finance (Expense/AP), SCM (travel agent), SharePoint
	Recruitment & Onboarding	Job requisition, candidate management, onboarding	HR, Payroll, BI
	HCM Analytics	Workforce metrics, attrition, training ROI	PMU dashboards, Data Warehouse
PROJECT & PORTFOLIO MANAGEMENT (PPM)	**Project Setup & WBS**	Define project structures, budgets, and cost centers	Finance (GL), SCM, BI
	Project Budgeting & Cost Control	Budget allocation, plan vs actual tracking	Finance (EPM), SCM
	Project Scheduling & Resource Management	Task assignment, time tracking, resource dependencies	HCM, BI
	Risk & Issue Management	Log, evaluate, and mitigate project risks	Facilities, ICT

	Change & Scope Control	Manage project change requests and approvals	ICT
	Project Billing & Revenue Recognition	Billing for client-funded or CAPEX projects	Finance (AR, GL)
	Project Reporting & Dashboards	Portfolio KPIs, variance, performance dashboards	PMU dashboards, Data Warehouse
CUSTOMER RELATIONSHIP MANAGEMENT (CRM)	**Customer Master Data & Segmentation**	Centralized customer database, classification by type & segment	Master Data Warehouse, Finance (AR), CIMS
	Lead & Opportunity Management	Capture leads, sales pipeline tracking, conversion rates	CIMS, LIMS, Marketing Systems
	Client Onboarding & Registration	Digital registration, document validation workflows	CIMS, Finance (AR), SharePoint
	Quotation & Proposal Management	Automated quotations, pricing catalogues, proposal tracking	Finance (AR), CIMS
	Order & Request Management	Manage customer orders for certification, testing, standards and BSAS	CIMS, LIMS, SCM
	Customer Engagement & Communication Centre	Omni-channel service (email, portal, calls), query tracking	SharePoint (Knowledge Base), PMU
	Service Level & Complaint Management	Track customer SLAs, complaints, resolutions	PMU, CIMS, Quality
	Marketing & Campaign Management	Campaign execution, lead nurturing, events (e.g., World Quality Day)	CRM, PMU, Marketing
	Customer Portal / Self-Service Platform	Clients access invoices, certificates, test results, Payments	CIMS, LIMS, Finance (AR), SharePoint
	Customer Analytics & Satisfaction Monitoring	Retention analysis, satisfaction scoring, NPS	PMU dashboards, Data Warehouse

	CRM Reporting & Dashboards	Pipeline visibility, conversion KPIs, customer insights	PMU dashboards, BI Layer
ENTERPRISE INTEGRATION & INTELLIGENCE LAYER	CIMS (Certification Information Management System)	Certification lifecycle, client data, certificate issuance	ERP (Finance billing), CRM, SCM, SharePoint, SABSTAN
	LIMS (Laboratory Information Management System)	Laboratory workflows, sample management, test results	ERP (Finance billing), Inventory, SCM, SharePoint
	SharePoint (ECM)	Document & records management, version control, Workflows	ERP (invoices, contracts), CIMS/LIMS (docs)
	SABSTAN (Standards Database)	Repository of SANS standards & Metadata	ERP (Finance revenue), CIMS, SCM
	Enterprise Data Warehouse / BI Layer	Analytics hub consolidating ERP, CRM, CIMS, LIMS data	PMU dashboards, EXCO/Board reporting
	Master Data Warehouse (MDW)	Single source of truth for master data: clients, suppliers, assets, employees, products, Standards	ERP, CRM, CIMS, LIMS, SABSTAN, SharePoint

LMS Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Typical Integrations / Connected Systems
Learning Management Core Setup	Configure LMS architecture, catalogues, competencies, and course hierarchies.	Centralized enterprise learning ecosystem.	HCM (Core HR), EPM (Performance), SharePoint (Content)
Course Administration	Create instructor-led, virtual, and e-learning courses, scheduling and enrolment.	Streamlined training management and attendance tracking.	HCM, Finance (AP/AR) (for training payments)
Learning Paths & Certifications	Define competency-based paths, recurring	Improved skills tracking and	HCM (Talent Management), PMU (Dashboards)

	certifications, and expiry alerts.	compliance readiness.	
Integration with HCM & Performance Management	Sync employee data, performance goals, and learning plans.	Unified link between performance appraisals and learning.	HCM, EPM
Integration with External Content Providers	Connect to LinkedIn Learning, Coursera, etc.	Access to global accredited content.	External APIs, OEM Integration Cloud
Learning Analytics & Reporting	Develop dashboards (training hours, certification status, spend vs budget).	Real-time insights on learning impact and ROI.	PMU Dashboards, MDW, BI Layer
User Portal / Mobile Access	Configure learner dashboard, self-service enrolment, notifications.	Enhanced accessibility and user experience.	HCM (User Profiles), SharePoint
Content Migration & Metadata Mapping	Import legacy training records and materials.	Historical data continuity and audit readiness.	SharePoint, MDW
Change Management & Communication	Adoption campaigns, readiness sessions, internal communications.	High user adoption and smooth transition.	HC Communications, PMU
Training & Knowledge Transfer	Train-the-trainer sessions and system manuals.	Sustainable in-house capability.	HCM, PMU
Support & Maintenance (Post-Go-Live)	SaaS support, incident resolution, monthly patches, minor enhancements.	Continuous system stability and user support.	ICT Service Desk

Internal ERP Integrations (Cross-Module within or Equivalent)

Integration Point	Linked Module / System	Purpose of Integration	Example of Data Flow	Expected Outcome / Benefit
General Ledger (GL)	Finance Core	Posts all cost entries and adjustments (absorption, variance,	Cost journals, allocation entries, variance postings.	Accurate financial statements and reconciliation with costing data.

		overheads) to GL accounts.		
Accounts Payable (AP)	Finance	Captures supplier invoices and assigns them to cost centers, projects, or assets.	Invoice → Cost Centre → Project / Asset mapping.	Real-time cost accumulation against budgets.
Inventory & Warehouse Management	SCM	Pulls material consumption, issues, and stock valuation data.	Material issue → Cost record update.	True cost of goods and services across laboratories and certification areas.
Procurement Management	SCM	Links purchase orders, supplier costs, and landed cost calculations.	PO price + freight + duties → cost structure.	Complete visibility of total landed cost per purchase.
Project Portfolio Management (PPM)	PMO / Finance	Tracks project budgets, actual costs, and profitability per project.	Labour + materials + overheads → Project cost ledger.	Enables project cost control and earned-value reporting.
Enterprise Performance Management (EPM)	Finance / EXCO	Feeds cost models and drivers for budgeting, forecasting, and variance analysis.	Unit cost per service → Budget & forecast models.	Better planning and cost efficiency analysis.
Facilities / Asset Management (EAM)	Facilities	Captures asset maintenance, energy, and facility utilization costs.	Work order costs → Asset ledger → Cost center.	Integrated view of operating and maintenance costs.
Human Capital Management (HCM)	HR / Payroll	Imports labour cost rates and staff time allocations to cost objects.	Payroll hours → Labour cost → Project or service.	True total cost of ownership (TCO) per function.
Customer Relationship Management (CRM)	Certification / Sales	Feeds cost data for service pricing and margin analysis.	Cost per certification/test → Pricing / quotation.	Cost-based pricing for services and tenders.

Certification Information Management System (CIMS)	Operations	Links certification project costs client accounts.	Certification project → Cost & billing link.	Improved cost recovery and client profitability reporting.
Laboratory Information Management System (LIMS)	LSD	Imports lab test resource and consumable usage data.	Test run → material + labour → cost sheet.	Full lab cost traceability for billing and reporting.

External / Peripheral Integrations

Integration Type	External System / Entity	Purpose / Function	Example Data Exchanged	Outcome / Value
Data Warehouse / MDW	Master Data Warehouse (MDW)	Consolidates cost data for analytics, dashboards, and benchmarking.	Cost centers, drivers, allocations, overheads.	Enterprise-wide cost intelligence and audit analytics.
Banks & Treasury Platforms	Commercial Banks	Reconcile actual cash outflows vs cost accruals.	Payment batches, interest, transaction fees.	Financial accuracy and liquidity tracking.
SharePoint / ECM	Document Repository	Stores costing templates, approval documents, and SOPs.	Costing policies, reports, workflow records.	Centralised, version-controlled documentation.
Audit & Reporting Tools	Internal Audit / AGSA	Provides read-only access or exports for audit verification.	Cost allocation logs, variance analysis, reconciliations.	Audit transparency and PFMA compliance evidence.
External Regulators / Treasury	National Treasury, DTIC, PFMA Compliance Systems	Ensure reporting aligns with PFMA, MTEF, and strategic cost frameworks.	Cost recovery rates, programme budgets, expenditure profiles.	Regulatory compliance and funding justification.

Appendix B

Intention to respond to the Request for Proposal

We hereby accept / decline your Request for Proposal.

Company:

Company
Representative:

Position/Title:

Signature:

Please state a brief reason for declining this Request for
Proposal

BIDDER'S DISCLOSURE   **SBD 4**

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offer in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1   Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise,

employed by the state?   **YES/NO**

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

2.2

Full Name	Identity Number	Name of State institution

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:

…………………………………………………………………………………………

1 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   DECLARATIONS

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 or arrangement with any competitor. However, communication between partners in a joint venture or consortium 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 Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not

2 Joint venture or Consortium means an association of people for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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 2022/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

……………………………   …………………………………………

Signature   Date

……………………………   …………………………………………

Position   Name of bidder

Appendix D

NON-DISCLOSURE AGREEMENT

THIS AGREEMENT is made BETWEEN
The South African Bureau of Standards (SABS), an organization established in terms of section 2 of the Standards Act (29 of 1993), whose registered office is at 1 Dr Lategan Road, Groenkloof, Pretoria, 0001, South Africa.

AND _____("the Bidder"),
Registration Number: _____whose registered office is at

_____ _____

_____
(Hereinafter referred to as the "parties")

WHEREAS in the course of discussions and/or negotiations with the South African Bureau of Standards, the Bidder has received, or may receive in future, information relating to **RFP 201928 The appointment of one or more service providers to a framework agreement for the provision, implementation, and support of an Enterprise Resource Planning (ERP) solution, including related modules, for a period of sixty (60) months. This includes the provision of ongoing support and maintenance services for SABS,** for the South African Bureau of Standards and other related information hereinafter referred to as "Confidential Information". "Confidential information" shall include, but not be limited to any information disclosed by the SABS and / or any of its their affiliates, employees, agents, representatives, subcontractors and consultants to the Bidder, its employees, agents, representatives and consultants, whether orally, in writing, by graphic, pictorial or electronic format, which information includes but is not restricted to Business information, including know how, commercial and technical aspects of products, processes and services; status and capabilities of the SABS' business; The SABS or its subcontractors' marketing and planning programs, products specifications, Service specifications, plans, drawings, test results and findings; financial, operational and technical data; and particular types of technologies and inventions, that already currently exist or that the SABS wishes to be developed, which could be subject to intellectual property rights, whether registered and/or unregistered.

Therefore, the parties wish to agree as follows:

1.   The Bidder undertakes to keep strictly secret and confidential all confidential information relayed or transmitted to it in any manner or form and will not divulge any part of the Confidential Information directly or indirectly to any person, firm or entity (other than such of its employees who have a need to know the Confidential Information for the purposes of fulfilling the Bidder's obligation to the South African Bureau of Standards).

2.   The Bidder undertakes to not make copies of the Confidential Information or otherwise disseminate any of the Confidential Information (except as may be required to fulfil specific obligations towards South African Bureau of Standards) without South African Bureau of Standards express prior written consent.

3.   This agreement applies to information whether such information is marked as or appears to be confidential and whether such information is of commercial use to South African Bureau of Standards or any other party.

4.   This agreement shall not apply to information which: -

(a)   The Bidder can show had been lawfully received by it prior to disclosure under this agreement.

(b)   is in the public domain or becomes so otherwise than through breach of this agreement.

(c)   was disclosed to the Bidder by a third party who was under no obligation of confidence in respect thereof.

5.   The Bidder further undertakes that the South African Bureau of Standards retains ownership of all Intellectual property rights on all material and processes developed that relate to the service provided for and on its behalf by the Bidder. The Bidder undertakes to transfer all said Intellectual Property Rights, whether registered and / or unregistered, to SABS, including undertaking to sign all forms necessary to affect such transfer.

6.   The Bidder acknowledges that the confidentiality obligations extend from signature of this agreement and survive the termination of the tender process, whether the Bidder is successful or not.

IN WITNESS WHEREOF the parties hereto have executed this agreement in duplicate.

Signed at………………… ……………on this………day of 2026

On behalf of the South African Bureau of Standards ……………………………….. …………. (signature) Luvuyo Tshabalala (Procurement)

Witness 1. ………………………………..   Witness 2. ………………………………..

Signed at……………………………… on this………. day of 2026

Signed on behalf of the Bidder, duly authorized thereto ....(signature)

...............…………………… (name)..(title)

Witness 1. ……………………………….   Witness 2. ……………………………….

To: tenders.luvuyo@sabs.co.za

Appendix F

SABS STANDARD TERMS AND CONDITIONS

Bidders must sign the terms and conditions to indicate acceptance thereof. Should the bidder have a variation/s, these must be submitted as Annexure F1 indicating the clause number, the rational for not accepting that specific clause and provide an alternative clause.

https://www.sabs.co.za/Procurement/docs/SABS%20STANDARD%20TERMS%20AND%20CONDITIONS%20FOR%20PROCUREMENT%20OF%20GOODS%20AND%20SERVICES. ... pdf

Appendix H – BBBEE Certificate/Sworn Affidavit

Appendix I

Quotation

Pricing Schedule for the Duration of the Contract

General Instructions

Bidders are required to submit a detailed and comprehensive price proposal. All costs associated with the bidder's proposal must be clearly itemized and included in the Total Bid Price. No additional or hidden costs will be considered after award of the contract.

Licensing and OEM Requirements

- License costs must be based on the **Original Equipment Manufacturer (OEM) Government/Public Sector rates** as prescribed by **SITA or equivalent frameworks** (where applicable).
- Bidders must attach **formal OEM quotations or rate confirmations** for all proposed licenses as part of the pricing submission.
- SABS reserves the right to verify the authenticity and validity of OEM quotations and license models.

Costing Structure

- The schedule below must be completed per module and per cost category. All prices shall be including VAT, expressed in South African Rand (ZAR), and shall include all costs, disbursements, resources and associated services necessary to complete the defined scope for each module.

Pricing Instructions and Conditions

Completion of Pricing Schedule

- Bidders must complete the pricing schedule for each module and cost category as outlined in the Pricing Schedule. All sections must be completed in full; incomplete schedules may render the bid non-responsive.

Currency and VAT

- All prices must be all-inclusive, inclusive of VAT, and quoted in South African Rand (ZAR).

Comprehensive Pricing Requirement

- The prices submitted are deemed to include all expenses, disbursements, labour, equipment, software, and any other resources required to complete the full scope of work for each module. No additional or hidden costs will be accepted after award.

Scope Familiarization

- Bidders must fully familiarize themselves with the detailed scope of work for each module prior to submission. The prices will be deemed to include all elements of the scope — including but not limited to data migration, system integration, information security, testing, change management, hosting, and project governance activities.

The costs cover the whole scope of work including support and maintenance and the license costs. Bidders must cost the items in full. All amounts are to be VAT-inclusive, reflect total cost of ownership (configuration → testing → training → handover, support and maintenance), and remain valid for 120 days from bid closing.

Module 1: Finance.

DETAILED SUBMODULE COSTING

No.	Finance Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time to Complete	Total Cost (ZAR, Excl. VAT)
1	**General Ledger (GL)**	Chart of Accounts design; intercompany setup; consolidation and close management	Standardized CoA and automated month-end close		
2	**Accounts Payable (AP)**	Invoice workflow; 3-way match; vendor settlements	Reduced processing time and improved payment accuracy		
3	**Accounts Receivable (AR)**	Billing automation; receipts; revenue recognition	Improved cash flow and real-time billing		
4	**Fixed Assets (FA)**	Asset register; depreciation. revaluation; disposal	Audit-ready asset records and valuation		
5	**Cash Management (CM)**	Bank integration; reconciliation; liquidity forecasting	Automated bank reconciliations and cash visibility		
6	**Expense Management**	Expense submission and travel integration	Controlled spending and policy compliance		
7	**Tax Management**	VAT and withholding tax setup and reporting	Automated tax returns and compliance		
8	**Budgeting & Planning (EPM)**	Forecast models. variance analysis; budget workflow	Integrated budget planning and cost control		

No.	Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
9	**Financial Reporting & Analytics**	Dashboards and management reports	Accurate real-time financial insight		
10	**Integration to External Systems**	Interfaces with SCM, HCM, PPM, CRM, CIMS, SABSTAN	Seamless data flow and audit trail		
11	**Training & Knowledge Transfer**	User training, manuals, super-user enablement	Skilled Finance users and internal support capacity		
12	**Change Management & Documentation**	Readiness workshops and communications	User adoption and smooth transition		
13	**Support & Maintenance (Post-Go-Live)**	SaaS application support; incident resolution; monthly patches; minor enhancements	Stable Finance module performance and sustainability		
14	**SaaS License Subscription – Finance Modules**	Annual subscription for Finance suite (GL, AP, AR, FA, CM, Tax, EPM) including global hosting, support and security	Fully managed ERP cloud environment with automatic upgrades and SLA-based availability	*Annual renewal (36-month contract)*	**R _____ per annum × 3 years**
15	**Local Data Residency & Replication (Johannesburg OCI)**	Configuration of data replication service between primary (EU) and secondary (SA) region; storage allocation; monitoring	In-country data copy for POPIA and audit compliance; 24-hour DR restore capability		**R _____ (one-off setup + annual hosting fee)**
	TOTAL (Finance Module)	—	—		**R _____**

SUPPLY CHAIN MANAGEMENT (SCM) MODULE PRICING SCHEDULE

No.	SCM Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)

1	**Procurement Management**	Configure requisition, PO, approval, and 3-way match processes.	Automated procurement lifecycle with audit trail.	
2	**Supplier Management / Portal**	Onboard, qualify, and manage supplier performance and CSD linkage.	Single supplier database and transparency in supplier evaluations.	
3	**Sourcing / Tender Management**	Setup RFQ/RFP templates, bid evaluation, and award workflows.	Improved turnaround and compliance with PPPFA.	
4	**Contract Management**	Configure contract repository, renewal alerts, and SLA tracking.	Centralised contract control and renewals visibility.	
5	**Inventory & Warehouse Management**	Define items, manage stock, replenishment, and warehouse structures.	Optimised stock levels and accurate valuation.	
6	**Receiving & Inspection**	Integrate goods receipts and quality checks with LIMS and Finance.	Seamless goods acceptance and QA traceability.	
7	**Logistics & Shipment Management**	Manage shipment scheduling, freight, and distribution.	Improved delivery tracking and cost management.	
8	**Supplier Collaboration & Performance Analytics**	Setup dashboards and KPIs for supplier delivery and compliance.	Improved supplier accountability and cost reduction.	
9	**Integration with External Systems**	Interface with Finance, LIMS, CIMS, SharePoint, and SABSTAN.	Consistent data flow and single source of truth.	

No.	Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
10	**Training, Change Management & Documentation**	End-user training and adoption support.	Skilled SCM team and smooth transition.		
11	**Support & Maintenance (Post-Go-Live)**	SaaS application support, monthly patching, and vendor coordination.	Stable SCM operation and compliance assurance.		
12	**SaaS Licence Subscription – SCM Suite**	Annual subscription covering Procurement, Contracts, Sourcing, Inventory, and Supplier Portal.	Fully managed cloud service with automatic updates and global SLA.	*Annual renewal (36-month contract)*	**R** _____ **per annum × 3 years**
13	**Local Data Residency & Replication (Johannesburg OCI)**	Replication of SCM data from EU to SA (Johannesburg OCI) for POPIA compliance.	Local backup and audit-ready data copy.		**R** _____ **(setup + annual hosting)**
	TOTAL (SCM Module)	—	—		**R** _____

FACILITIES MANAGEMENT (EAM/FM) MODULE PRICING SCHEDULE

No.	Facilities Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
1	**Asset Register & Maintenance**	Capture assets, schedule preventive and reactive maintenance.	Improved asset lifecycle visibility.		
2	**Work Order Management**	Workflow for maintenance requests and task tracking.	Faster fault resolution.		
3	**Health & Safety / Compliance**	Incident logging and contractor safety audits.	Reduced risk and compliance with OHS.		

No.	Sub-Module	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
4	**Project & CAPEX Management**	Plan and monitor facility refurbishments.	Budget control and reporting.		
5	**Reporting & Dashboards**	Real-time asset and maintenance dashboards.	Operational visibility.		
6	**SaaS Licence Subscription – EAM Suite**	Annual SaaS licence covering EAM and Work Order Management.	Managed service with global support SLA.	*Annual renewal (36-month contract)*	**R_____ per annum × 3 years**
7	**Local Data Residency & Replication (Johannesburg OCI)**	Replication of asset and facility data to SA OCI.	POPIA compliance and DR readiness.		**R_____ (setup + annual hosting)**
	TOTAL (Facilities Module)	—	—		**R _____**

HUMAN CAPITAL MANAGEMENT (HCM) MODULE PRICING SCHEDULE

No.	HC Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
1	**Core HR**	Configure employee master, positions, and organisation structure.	Centralised employee records and structures.		
2	**Recruitment & Onboarding**	Workflow for vacancy creation, shortlisting, and onboarding.	Faster hiring cycle and compliance with HR policy.		
3	**Performance & Talent Management**	Define KPIs, review cycles, and talent mapping.	Performance-based development and retention.		
4	**Learning & Development**	Configure training catalogues and skills management (linked to LMS).	Targeted training and competency tracking.		

No.		Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
5	**Payroll (External / Interface)**	Integrate to 3rd party payroll provider.	Seamless payroll processing and compliance.		
6	**Travel & Expense Management**	Workflow for travel requests, claims, and approvals.	Controlled spending and transparency.		
7	**Reporting & Analytics**	HR dashboards and workforce analytics.	Real-time insight into HR KPIs.		
8	**Integration with External Systems**	Interfaces with Finance, Facilities, and EPM.	Data alignment across departments.		
9	**Change Management & Training**	User enablement and communications.	Adoption and system readiness.		
10	**Support & Maintenance (Post-Go-Live)**	SaaS support and updates.	Sustainable HR system operations.		
11	**SaaS Licence Subscription – HC Suite**	Annual licence covering Core HR, Recruitment, Talent, and Travel.	Managed cloud hosting and automatic updates.	*Annual renewal (36-month contract)*	R _____ **per annum × 3 years**
12	**Local Data Residency & Replication (Johannesburg OCI)**	SA data mirror of all HR information.	POPIA-compliant data sovereignty and DR.		R _____ **(setup + annual hosting)**
	TOTAL (HC Module)	—	—		R _____

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) MODULE PRICING SCHEDULE

No.	CRM Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
1	**Client Registration & Master Data**	Setup client data model, contact management, and profiles.	Single customer view across SABS.		

No.		Key Deliverables / Activities	Outcome / Expected Result	Estimated Time to Complete	Total Cost (ZAR, Excl. VAT)
2	**Customer Engagement Tracking**	Manage leads, communications, and interactions.	Improved customer service visibility.		
3	**Case Management**	Workflow for service requests and complaints.	Faster resolution and accountability.		
4	**Sales & Opportunity Management**	Track opportunities, pipelines, and conversion rates.	Enhanced sales management.		
5	**CRM Analytics**	Dashboards for pipeline, satisfaction, and response time.	Insight-driven engagement strategy.		
6	**Integration with CIMS / Finance**	Real-time link to Certification, Billing, and AR.	Seamless customer lifecycle view.		
7	**SaaS Licence Subscription – CRM Suite**	Annual SaaS subscription for CRM and Analytics.	Managed hosting and 99.9% SLA.	*Annual renewal (36-month contract)*	**R** _____ **per annum × 3 years**
8	**Local Data Residency & Replication (Johannesburg OCI)**	Mirror CRM database to Johannesburg OCI for POPIA compliance.	In-country data copy for AGSA audit readiness.		**R** _____ **(setup + annual hosting)**
	TOTAL (CRM Module)	—	—		**R** _____

Learning Management Module.

No.	Learning Management Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time to Complete	Total Cost (ZAR, Excl. VAT)
1	**Learning Management Core Setup**	Configure LMS structure, course catalogues, competencies, and learning paths.	Standardised enterprise-wide learning environment.		

#					
2	**Course Administration**	Create instructor-led, virtual, and e-learning courses; scheduling, enrolment, and completion tracking.	Centralised training management and attendance visibility.		
3	**Learning Paths & Certifications**	Define competency-based learning paths, recurring certifications, and expiry alerts.	Improved staff competency tracking and compliance readiness.		
4	**Integration with HCM & Performance Management**	Sync employee data, roles, and performance plans.	Seamless link between performance appraisals and learning plans.		
5	**Integration with External Systems**	Interfaces to HR Core, Payroll, EPM, and external content providers (LinkedIn Learning, Coursera etc.).	Automated data flow and unified user experience.		
6	**Learning Analytics & Reporting**	Custom dashboards on training hours, certification status, and impact analysis.	Real-time learning insights for EXCO and HR.		
7	**User Experience / Portal Design**	Configure learner portal, dashboards, mobile access, and notifications.	Intuitive, self-service access improving user adoption.		
8	**Content Migration & Metadata Mapping**	Import legacy training records and course materials.	Complete historical data continuity and POPIA-compliant transfer.		
9	**Change Management & Communication**	Stakeholder engagement, change readiness workshops,	Smooth transition and minimal disruption.		

No.		Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
		user adoption campaigns.			
10	**Training & Knowledge Transfer**	Train-the-trainer sessions, user manuals, process documentation.	Skilled HR and training officers able to manage LMS independently.		
11	**Support & Maintenance (Post-Go-Live)**	SaaS application support, monthly patching, functional assistance, configuration tuning.	Stable LMS operation and sustained user support.		
12	**SaaS Licence Subscription – Learning Module**	Annual SaaS subscription covering Learning Management, Learning Analytics, and integration with Core HR and Performance Management.	Fully managed cloud service with upgrades, support, and SLA-based uptime.	*Annual renewal (36-month contract)*	**R** _____ **per annum × 3 years**
13	**Local Data Residency & Replication (Johannesburg OCI)**	Configure replication of LMS data from regions to SA/ Johannesburg OCI for POPIA compliance; includes storage, monitoring, DR testing.	In-country copy of learning data for audit and sovereignty assurance.		**R** _____ **(one-off setup + annual hosting fee)**
	TOTAL (Learning Module)	—	—		**R** _____

PROJECT & PORTFOLIO MANAGEMENT (PPM) MODULE PRICING SCHEDULE

No.	PPM Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
1	**Project Setup & Lifecycle Management**	Define project templates, stages, and budgets.	Standardised project governance and control.		

No.		Key Deliverables / Activities	Outcome / Expected Result	Estimated Time to Complete	Total Cost (ZAR, Excl. VAT)
2	**Resource Management**	Allocate staff and equipment to projects.	Improved utilisation and transparency.		
3	**Cost & Budget Control**	Configure budget tracking and earned value metrics.	Real-time project cost visibility.		
4	**Scheduling & Milestones**	Define tasks, dependencies, and Gantt chart visibility.	On-time delivery and progress tracking.		
5	**Integration with Finance & SCM**	Sync budgets, procurement, and CAPEX data.	Aligned project-financial data.		
6	**Reporting & Dashboards**	Develop project dashboards and reports.	Improved portfolio decision-making.		
7	**SaaS Licence Subscription – PPM Suite**	Annual subscription for PPM Cloud.	Managed ERP cloud service with SLA uptime.	*Annual renewal (36-month contract)*	R _____ **per annum × 3 years**
8	**Local Data Residency & Replication (Johannesburg OCI)**	Replication of project and financial data to SA OCI.	Data sovereignty and POPIA compliance.		R _____ **(setup + annual hosting)**
	TOTAL (PPM Module)	—	—		R _____

ENTERPRISE INTEGRATION & INTELLIGENCE LAYER PRICING SCHEDULE

No.	Integration / Intelligence Component	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time to Complete	Total Cost (ZAR, Excl. VAT)
1	**Enterprise Integration Architecture Design**	Define system-to-system integration landscape (ERP↔CIMS↔LIMS↔SABSTAN↔SharePoint↔	End-to-end blueprint ensuring secure, standardised data exchange.		

		CRM↔Banks,SARS AND CSD)			
2	**Integration Platform Setup (OIC / Middleware)**	Configure Integration Cloud (OIC) or equivalent middleware for API, batch, and file-based integrations.	Unified integration hub enabling real-time connectivity.		
3	**API / Service Development**	Build REST / SOAP APIs, adapters, and secure endpoints for all core systems.	Seamless data exchange with traceable audit logs.		
4	**Data Migration Services**	Extract, transform, cleanse, and load legacy data from JDE, SABSTAN, CIMS, LIMS, and Excel repositories.	Accurate migration with reconciled financial and operational data.		
5	**Master Data Warehouse (MDW) Setup**	Establish enterprise-wide data warehouse for master and transactional data.	Central source of truth for reporting and analytics.		
6	**Data Quality & Governance Framework**	Define validation rules, stewardship roles, and audit controls.	High-quality, consistent enterprise data.		
7	**Business Intelligence & Analytics Layer**	Develop Power BI / Analytics dashboards (finance, SCM, HC, facilities).	Real-time dashboards supporting EXCO and Board reporting.		
8	**Integration with External Entities**	Connect to banks, SARS eFiling, CSD, external regulators, and SITA gateways.	Streamlined regulatory and financial data exchange.		
9	**Security & Access Control**	Implement single sign-on (SSO), encryption, and access policies across all interfaces.	Secure, role-based integration environment.		

10	**Monitoring & Logging Tools**	Configure audit trails, dashboards, and performance logs for all integrations.	Early-warning visibility of integration failures.		
11	**Training & Knowledge Transfer**	Train ICT and PMO teams on data pipelines, middleware administration, and reporting tools.	Sustainable internal capability.		
12	**Change Management & Documentation**	Maintain interface inventory, data flow diagrams, and update control documents.	Standardised documentation for audit readiness.		
13	**Support & Maintenance (Post-Go-Live)**	Middleware monitoring, incident response, and monthly patch management.	Stable, high-performance integration ecosystem.		
14	**SaaS Licence Subscription – Integration & Analytics Layer**	Annual subscription for Integration Cloud (OIC), Analytics Cloud (OAC), and related connectors.	Fully managed service with SLA-based uptime and automatic updates.	*Annual renewal (36-month contract)*	**R _____ per annum × 3 years**
15	**Local Data Residency & Replication (Johannesburg OCI)**	Configure replication of master data warehouse and analytics datasets from EU to Johannesburg OCI.	POPIA-compliant local backup for DR and audit assurance.		**R _____ (one-off setup + annual hosting)**
	TOTAL (Enterprise Integration & Intelligence Layer)	—	—		**R _____**

MASTER WAREHOUSE DATA PRICING SCHEDULE.

No.	MDW Component / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time to Complete	Total Cost (ZAR, Excl. VAT)
1	**MDW Architecture & Design**	Define logical, physical, and conceptual data models; identify master data domains (Finance, HR, SCM, CRM, Facilities, CIMS, LIMS).	Enterprise-wide blueprint for single source of truth.		
2	**Data Model Development**	Develop unified master data structures (Customers, Suppliers, Assets, Employees, Standards, Products).	Consistent data schema across all systems.		
3	**ETL (Extract, Transform, Load) Pipelines**	Build automated data ingestion pipelines from ERP, CIMS, LIMS, SABSTAN, and external sources.	Seamless, auditable data synchronization.		
4	**Metadata Management**	Configure metadata repository with data lineage, cataloguing, and audit trail.	Improved traceability and data transparency.		
5	**Data Quality Management**	Implement validation, deduplication, and reconciliation rules.	Clean, reliable master data for all business units.		
6	**Data Governance Framework**	Define stewardship roles, data ownership, and change control procedures.	Institutionalised data accountability.		
7	**MDW Security & Access Control**	Configure user roles, SSO integration, and encryption standards.	Secure, compliant data access aligned to POPIA.		

No.	Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)
8	Analytics & BI Integration	Connect MDW to Analytics, Power BI, and EXCO dashboards.	Organisation-wide reporting consistency.		
9	Monitoring & Maintenance Dashboards	Build real-time dashboards for data load status, error logs, and ETL performance.	Proactive monitoring of data flows.		
10	Training & Knowledge Transfer	Train data stewards, PMO analysts, and ICT administrators.	Sustainable internal data management capability.		
11	Change Management & Documentation	Prepare governance manuals, process maps, and SOPs for data updates.	Standardised operational discipline.		
12	Support & Maintenance (Post-Go-Live)	Monitor ETL jobs, refresh cycles, error resolution, and patch management.	Continuous data availability and accuracy.		
13	OEM SaaS Licence Subscription – MDW Suite	Annual subscription for Autonomous Data Warehouse (ADW), Data Integrator, and related services.	Fully managed SaaS environment with global SLA and auto-scaling.	*Annual renewal (36-month contract)*	R _____ **per annum × 3 years**
14	Local Data Residency & Replication (Johannesburg OCI)	Replication of MDW datasets from primary (EU) to secondary (Johannesburg) region for POPIA and audit readiness.	In-country copy ensuring data sovereignty and DR readiness.		R _____ **(one-off setup + annual hosting)**
	TOTAL (MDW Layer)	—	—		R _____

ENTERPRISE PERFORMANCE MANAGEMENT MODULE PRICING SCHEDULE

No.	EPM Sub-Module / Functional Area	Key Deliverables / Activities	Outcome / Expected Result	Estimated Time	Total Cost (ZAR, Excl. VAT)

1	**Planning & Budgeting**	Define models, workflow approvals, and cost centers.	Integrated financial and operational planning.		
2	**Forecasting & Scenario Modelling**	Build forecasting models and variance analysis dashboards.	Proactive decision-making and trend visibility.		
3	**Performance Scorecards**	Develop organisational scorecards and KPI dashboards.	Aligned enterprise performance tracking.		
4	**Financial Consolidation**	Automate group-level consolidation and reporting.	Faster and accurate consolidated results.		
5	**Reporting & Analytics**	Design interactive dashboards and EXCO packs.	Transparent reporting across divisions.		
6	**Integration with Finance & HR**	Connect with GL, Projects, and HR KPIs.	Single view of performance and resources.		
7	**Training & Change Management**	User enablement and communications.	Enhanced analytics adoption and skills.		
8	**SaaS Licence Subscription – EPM Suite**	Annual subscription for EPM Cloud.	Cloud-hosted planning and analytics suite.	*Annual renewal (36-month contract)*	R _____ **per annum × 3 years**
9	**Local Data Residency & Replication (Johannesburg OCI)**	Mirror of EPM repository in SA.	Data sovereignty and audit-ready compliance.		**R_____ (setup + annual hosting)**

TOTAL (EPM Module)	—	—		R _____

PRICING NOTES AND COST PRICE ADJUSTMENT (CPA) CLAUSE

1. All prices must include **project inception and mobilization, configuration, integration, testing, training, documentation, and post-go-live support/maintenance**.

2. The *Outcome* column must clearly identify measurable deliverables for verification before payment.

3. Travel and disbursements must comply with **National Treasury Cost Containment Instructions** and **SABS Travel Policy**.

4. Pricing must align with approved **ERP Implementation Plan milestones**.

5. **Support & Maintenance:**
   o Minimum **12 months' post-go-live coverage** required.
   o Includes performance tuning, report optimization, and end-user support.
   o Renewable annually based on performance.

6. **Cost Price Adjustment (CPA):**

   o The contract prices shall remain firm and fixed for the entire duration of the contract.
   o Bidders are therefore required to factor in all anticipated cost escalations, inflationary trends, and exchange rate fluctuations in their pricing submissions to ensure full cost recovery over the contract term.
   o **NB:** The *estimated implementation duration* as indicated on the tables is **for planning purposes only**.

7. All prices shall remain **firm and fixed** for the duration of any approved Call-Off Order or project phase.

8. SABS reserves the right to verify, review, and negotiate any pricing prior to award.

TOTAL FRAMEWORK VALUE (Excl. VAT) (All Modules)	R_____
TOTAL FRAMEWORK VALUE (Incl. VAT)	R_____

Bidder Declaration

I, the undersigned, certify that the prices quoted above are accurate, all-inclusive, and comply with the requirements of this bid.

- Bidder Name: _____

  Authorized Representative: _____

  Signature: _____

  Date: _____

Appendix J
Management Summary

Appendix K
Statement of Compliance to the Request for Proposal

Company Name: _____

Proposed Service: _____

It is hereby confirmed that the proposal response to SABS' RFP is fully compliant with all points except for the specific issues outlined below:

_____
_____
_____
_____
_____
_____
_____
_____
_____

Signed: _____(Authorized Signatory)

Name: _____

Position: _____

Date: _____

Appendix
Page 2 of tender document L

AUDITED FINANCIAL STATEMENT M

Request for Proposal Enquiry N

To: Luvuyo.Tshabalala@sabs.co.za   **From:**

_____

Questions:

Answers:

To: Luvuyo.Tshabalala@sabs.co.za

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
-        the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

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.

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 a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding 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:

80/20   **or**   **90/10**

$$Ps = 80\left(1 - \frac{Pt - Pmin}{Pmin}\right) \quad \text{or} \quad Ps = 90\left(1 - \frac{Pt - Pmin}{Pmin}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

80/20   **or**   **90/10**

$$Ps = 80\left(1 + \frac{Pt - Pmax}{Pmax}\right) \quad \text{or} \quad Ps = 90\left(1 + \frac{Pt - Pmax}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest 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) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system: or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point 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 applicable, corresponding points must also be indicated as such.

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

Specific Goal	The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Persons historically disadvantaged on the basis of race	100% black ownership		10		
	75% - 99% black ownership		8		
	60% - 74% black ownership		6		
	51% - 59% black ownership		4		
	0% - 25% black ownership		2		
	0% black ownership		0		

			Points		
Persons historically disadvantaged	100% black women ownership		6		
	51% - 99% black women ownership		4		
on the basis of gender	30% - 50% black women ownership		2		
	0% black women ownership		0		
Persons historically disadvantaged on the basis of disability	100% owned by persons living with disabilities		4		
	51% - 99% owned by persons living with disabilities		2		
	0% - 50% owned by persons living with disabilities		0		

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
[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorized 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 favorable 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 *audi alteram partem* (hear the other side) rule has been applied; and

(e)   forward the matter for criminal prosecution, if deemed necessary.

……………………………………….

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: ……………………………………………………….

DATE: ……………………………………………………

ADDRESS: ………………………………   ………………………

………………………………………………………

PART A
INVITATION TO BID

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

BID NUMBER:	RFP 201928	CLOSING DATE:	8th April 2026	CLOSING TIME:	11:00am

DESCRIPTION	The appointment of one or more service providers to a framework agreement for the provision, implementation, and support of an Enterprise Resource Planning (ERP) solution, including related modules, for a period of sixty (60) months. This includes the provision of ongoing support and maintenance services for SABS.

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON		CONTACT PERSON	
TELEPHONE NUMBER		TELEPHONE NUMBER	
E-MAIL ADDRESS		E-MAIL ADDRESS	

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		**OR**	CENTRAL SUPPLIER DATABASE No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ 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?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR **THE GOODS /SERVICES /WORKS OFFERED?**	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

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.

SBD1

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."

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:

APPENDIX N — CALL-OFF ORDER TEMPLATE

(Issued Under the ERP Framework Agreement)

---

1. CALL-OFF ORDER DETAILS

Item	Description
Framework Reference	SABS/ERP/Framework/_____/20___
Call-Off Order Reference No.	SABS/ERP/Call Off/_____/20___
Date of Issue	____/ ____/ 20___
Service Provider Name	
Service Provider Framework Category	(e.g. Finance, SCM, HCM, CRM, PPM, EPM, MDW, Integration, Facilities)
ERP PMU Reference	
SABS Contact Person / Project Manager	
Implementation Partner Contact Person	
Contracting Period (Months)	
Total Call-Off Value (ZAR, VAT Incl.)	R
Funding Source / Cost Centre	
Approval Reference (PMU / CFO / EXCO)	

---

2. BACKGROUND AND CONTEXT

This Call-Off Order is issued in accordance with the **ERP Framework Agreement** between the South African Bureau of Standards (SABS) and the appointed service provider.
It defines the specific **scope of work, deliverables, milestones, costs, and timeframes** applicable to this engagement.

This Call-Off Order forms part of the SABS Digital Transformation Programme and must be implemented in accordance with:

- The approved **ERP Governance Framework**,
- The **Project Management Methodology (Hybrid Stage-Gate)**, and
- The relevant **SABS ICT and PMO governance policies**.

3. SCOPE OF WORK / MODULE COVERED-Example

Module / Category	Sub-Modules / Work Packages	Brief Description of Activities	Expected Outcome / Deliverable
(e.g. Finance)	GL, AP, AR, FA	Configure finance modules, integrations, UAT, training	Automated finance processes and reporting
(e.g. SCM)	Procurement, Supplier Portal	Configure sourcing and supplier Management	Digital supply chain enablement

(Attach relevant Annexure B — Pricing Schedule and Traceability Matrix excerpt for reference.)

---

4. KEY DELIVERABLES AND MILESTONES

No.	Deliverable / Milestone	Due Date	Acceptance Criteria / Verification Evidence	Payment %
1	Project Inception Report & Mobilisation	DD/MM/YYYY	Signed-off inception report, project plan, stakeholder register	10%
2	Configuration & Development Completion	DD/MM/YYYY	Configured system modules, unit test Results	25%
3	UAT & User Training	DD/MM/YYYY	UAT sign-off, training attendance & Manuals	25%
4	Go-Live & Handover	DD/MM/YYYY	Production deployment confirmation	20%
5	Support & Maintenance Phase (3–12 months)	DD/MM/YYYY	Monthly performance reports, issue Log	20%
	TOTAL			**100%**

(Payment milestones to align with actual project phase approved by PMU.)

5. PRICING SUMMARY

Cost Category	Description	Total Cost (ZAR, VAT Incl.)
Configuration & Development	As per approved module pricing (Annexure B___)	R _____
Testing & UAT		R _____
Training & Documentation		R _____
Go-Live & Deployment		R _____
Support & Maintenance (12 months)		R _____
TOTAL CALL-OFF VALUE		**R _____**

NB:

- The above pricing is drawn directly from the approved Framework rate card and is **fixed and not subject to adjustment** due to timeline variations.
- Any annual escalation applicable to support & maintenance will follow the **CPI-based Cost Price Adjustment (CPA) Clause** defined in the Framework Agreement.

---

6. ROLES AND RESPONSIBILITIES

Role / Function	SABS Responsibility	Service Provider Responsibility
PMU	Governance, monitoring, milestone approval	Project delivery tracking, status reporting
ICT Division	System architecture, data security	Integration, configuration, documentation
Business Unit Owner	UAT participation, functional validation	Requirements implementation, user training

ERP PMU / QA Lead	Review of deliverables and signoffs	Respond to review feedback and update artefacts

7. GOVERNANCE, REPORTING & CHANGE CONTROL

1. The service provider must submit **weekly progress reports** and participate in **bi-weekly PMU review meetings**.
2. All changes to scope, timeline, or cost must follow the **SABS Change Control Procedure** and be approved in writing by the PMU and ICT.
3. Acceptance of deliverables is subject to **formal sign-off** by the PMU and Business Owner using the standard Acceptance Certificate (Annexure D-1).
4. Any deviation from scope or timelines without written approval constitutes **breach of contract** under the Framework Agreement.

8. PAYMENT TERMS

- Payments will be made **upon verification of deliverables** and submission of a valid tax invoice, in accordance with the approved milestone percentages in Section 4.
- No advance payments will be made.
- All invoices must reference the **Call-Off Order number** and be accompanied by the relevant **Acceptance Certificate**.
- Payments are subject to **PFMA Section 38(1)(f)** requirements and **Treasury Regulation 8.2.3** on proof of service delivery.

9. COST PRICE ADJUSTMENT (CPA)

- No escalation shall apply within the first **12 months** of the Call-Off.
- Thereafter, annual adjustments shall be limited to **CPI (All Items)** as published by **Statistics South Africa**, applicable **only to support & maintenance**.
- The service provider must submit adjustment requests **30 days prior** to the anniversary date with supporting CPI evidence.
- If CPI ≤ 0 %, **no increase applies**.

10. ACCEPTANCE & SIGNATURES

By signing this Call-Off Order, both parties confirm that they have read, understood, and agreed to the terms contained herein and in the underlying Framework Agreement.

For and on behalf of SABS	For and on behalf of the Service Provider
Name: _____	Name: _____
Designation: _____	Designation: _____
Signature: _____	Signature: _____
Date: _____	Date: _____

11. ATTACHMENTS

- Annexure B (Pricing Schedule per Module)
- Annexure C (Traceability Matrix)
- Annexure D-1 (Acceptance Certificate Template)
- Project Plan & Milestone Schedule
- Governance & Reporting Templates (optional)

APPENDIX O — FRAMEWORK GOVERNANCE CHARTER APPENDIX

Purpose

To define the governance roles, responsibilities, and authority levels for the oversight, assurance, approval, and management of activities under the SABS ERP Framework Agreement and all subsequent Call-Off Orders.

1. GOVERNANCE PRINCIPLES

All activities conducted under the ERP Framework shall be governed by the following principles:

- **Transparency:** Decisions and approvals shall be made in an open and auditable manner.
- **Accountability:** Each governance structure is accountable for specific outcomes as defined herein.
- **Segregation of Duties:** Functional roles (technical, financial, procurement, and programme) are clearly separated.
- **Quality & Compliance:** All processes adhere to PFMA, National Treasury Instructions, and SABS internal governance policies.
- **Audit Readiness:** All documentation, call-offs, and deliverables must be traceable and reviewable by Internal Audit and the Auditor-General.

2. FRAMEWORK GOVERNANCE STRUCTURE

Governance Role	Primary Mandate	Key Responsibilities	Authority / Decision Rights

Programme Management Office (PMO)

Primary Mandate: Programme Oversight, Quality Assurance and Reporting

Key Responsibilities:

- Oversee implementation of the ERP Framework and all call-offs.
- Review, monitor, and report on progress, quality, and compliance with the approved Stage-Gate / Hybrid Agile methodology.
- Ensure deliverables align with SABS strategic objectives and the Digital Transformation Plan.
- Maintain the Traceability Matrix linking deliverables, milestones, and payments.
- Verify deliverables prior to acceptance and payment.
- Coordinate governance signoffs with ICT, Finance, and SCM.
- Submit consolidated monthly ERP Programme Reports to EXCO and the Audit & Risk Committee.
  Authority / Decision Rights:
  Sign-off authority on deliverable quality and milestone verification.
  Escalation authority for risk and performance non-compliance.

Project Steering Committee (PSC)

Primary Mandate: Programme Direction, Decision Making and Cross-Functional Governance

Composition: Executive Sponsor (Chair), Head of PMO, CFO, Head ICT, Head SCM, Divisional Heads of affected business units.

Key Responsibilities:

- Serve as the **primary governance body** overseeing ERP implementation progress, risks, and change requests.
- Review and approve major design changes, schedule adjustments, and budget variations within delegation.
- Resolve inter-divisional dependencies and resource constraints.
- Endorse deliverables prior to Executive Sponsor approval.
- Monitor overall ERP Programme health via monthly PMO dashboard reviews.
- Recommend escalation to EXCO where strategic intervention is required.

  Authority / Decision Rights:

  Decision-making authority for scope, timeline, and budget variations within delegated thresholds.

  Endorsement authority for Go-Live, benefits realisation, and closure reports before Executive Sponsor approval.

  Right to request independent assurance from Internal Audit or ICT Security.

Supply Chain Management (SCM)

Primary Mandate: Commercial and Procurement Compliance

Key Responsibilities:

- Ensure PFMA and Treasury compliance for all ERP procurements and call-offs.
- Validate pricing, deliverables, and contract terms against the approved Framework.
- Maintain the repository of contracts and bid records.
- Verify Bid Adjudication Committee approvals and any contract amendments.

  Authority / Decision Rights:

  Commercial compliance assurance before contract execution.

  Endorsement authority for Call-Off Orders before Finance and Executive Sponsor approval.

Information & Communication Technology (ICT)

Primary Mandate: Technical Assurance and Systems Integrity

Key Responsibilities:

- Provide technical assurance on architecture, integration, and security.
- Endorse system designs and integration blueprints.
- Monitor enterprise-wide interfaces (ERP ↔ CIMS ↔ LIMS ↔ SABSTAN ↔ SharePoint ↔ MDW).
- Validate data migration and hosting readiness.

  Authority / Decision Rights:

  Technical acceptance authority for configuration and integration deliverables.

  Advisory authority on hosting and licensing compliance.

Finance Division

Primary Mandate: Financial Governance and Budget Confirmation

Key Responsibilities:

- Confirm funding availability before Call-Off issuance.
- Validate cost centre allocations and budget compliance.
- Review payment schedules against Treasury Reg 8.2.3.
- Track ERP expenditure and variance.

  Authority / Decision Rights:

  Budget confirmation authority prior to Call-Off award.

  Payment authorisation post-PMU verification.

  Oversight of ERP expenditure against MTEF budget.

Executive Sponsor (COO / EXCO Delegate)

Primary Mandate: Strategic Oversight and Call-Off Approvals

Key Responsibilities:

- Act as executive champion for ERP Programme.
- Approve all Call-Off Orders and variations.
- Chair Quarterly ERP Governance Reviews and Project Steering Committee sessions.
- Resolve strategic risks and cross-divisional issues.
- Endorse final deliverables to EXCO and Board.

  Authority / Decision Rights:

  Final approval authority for Call-Offs and scope changes.

  Strategic decision-making authority on prioritisation and funding allocation.

3. ESCALATION AND DECISION PATH

Level	Escalation Trigger	Escalation Recipient	Decision Timeline
Level 1	Operational issue or delay (<10% variance)	PMO Manager	Within 3 working days
Level 2	Schedule, cost, or resource deviation (>10%)	Project Steering Committee	Within 5 working days
Level 3	Strategic issue, scope variation, or funding request	Executive Sponsor / EXCO	Within 10 working days

4. GOVERNANCE DELIVERABLES AND REPORTING CYCLE

Governance Body	Deliverable / Report	Frequency	Recipient / Reviewer
PMO	ERP Programme Dashboard & Performance Report	Monthly	EXCO, Audit & Risk Committee
ICT	Technical Assurance & Security Compliance Report	Quarterly	PMU & EXCO
SCM	Framework Compliance & Procurement Status Report	Quarterly	CFO & EXCO
Finance	ERP Expenditure and Budget Utilisation Report	Monthly	PMU & CFO
Project Steering Committee	Consolidated ERP Status and Risk Report	Monthly	Executive Sponsor / EXCO
Executive Sponsor	ERP Progress Summary & Decision Register	Quarterly	EXCO / Board

5. APPROVAL AND REVIEW

This Governance Charter Appendix forms part of the **ERP Framework Agreement** and shall be reviewed annually or upon any material change in structure, policy, or programme scope.

Name	Designation	Signature	Date
_____	Head: PMO		
_____	Head: ICT		
_____	CFO / Head: Finance		
_____	Head: SCM		
_____	Executive Sponsor / COO		
_____	Chairperson: BSC		

Purpose

The Master KPI Register defines the standard **performance metrics, thresholds, and verification methods** applicable to all service providers appointed under the SABS ERP Framework.

These KPIs form the **baseline performance standards** to be mirrored in every Call-Off Order and Statement of Work (SOW) issued under this Framework.

1. KPI CATEGORIES OVERVIEW

Category	Focus Area	Purpose
A. System Performance & Availability	Measures system uptime, stability, and response time	Ensure consistent system performance and reliability
B. Service Delivery & Resolution	Measures incident, defect, and request turnaround times	Drive accountability and responsive support
C. Implementation Quality & Compliance	Measures adherence to scope, milestones, and governance	Ensure quality assurance and PFMA compliance
D. User Experience & Adoption	Measures system adoption and user Engagement	Ensure realised value and usability
E. Data Quality & Integration	Measures data integrity, migration accuracy, and interface reliability	Maintain trustworthy and integrated ERP data environment
F. Governance, Reporting & Documentation	Measures compliance with reporting cycles, documentation standards, and governance Artefacts	Ensure transparency, audit readiness, and consistency

2. MASTER KPI REGISTER

#	KPI Category	KPI Description	Target / Threshold	Measurement Frequency	Verification Method / Evidence
A1	System Availability	ERP production environment uptime (during business hours)	≥ **99.5%** uptime per calendar month	Monthly	System monitoring report / dashboard
A2	Response Time	Average page load time for critical transactions	≤ **3 seconds**	Monthly	Performance logs / UAT report
A3	Data Backup Success	Successful daily backup completion	**100%**	Daily	System backup logs
B1	Priority 1 (P1) Incident Resolution	Critical incidents resolved within 8 hours	≤ **8 hours**	As required	Incident management tool logs

B2	Priority 2 (P2) Incident Resolution	High-priority incidents resolved within 24 hours	≤ **24 hours**	As required	Incident management tool logs
B3	Change Request Turnaround	Minor change request implementation	≤ **5 working Days**	Per change	Change request tracker
C1	Deliverable Quality Compliance	Deliverables approved at first submission (no rework)	≥ **90%**	Monthly	Acceptance certificates
C2	Schedule Adherence	Completion of deliverables per approved timeline	≥ **95% on-time delivery**	Monthly	Project schedule tracker / ClickUp
C3	Compliance with Stage-Gate / QA Requirements	Evidence of approvals and governance artefacts per gate	**100% Compliance**	Per gate	Gate checklists / PMU audit
D1	User Adoption Rate	Active users / total trained users post go-live	≥ **90% adoption** within 60 days	Post go-live	System usage logs / training attendance
D2	Training Effectiveness	Post-training satisfaction rating	≥ **85%**	Post training	Training evaluation forms
E1	Data Migration Accuracy	Data accuracy post-load	≥ **98%**	Per migration cycle	Data validation & audit report
E2	Integration Reliability	Successful ERP ↔ external system interfaces (CIMS, LIMS, SABSTAN, SharePoint, MDW)	≥ **99%** interface success rate	Monthly	Integration logs
E3	Master Data Quality	Duplicate or invalid records within ERP	≤ **1%**	Monthly	MDW data profiling report
F1	Governance Reporting Compliance	Submission of monthly project and risk reports to PMU	**100%** on time	Monthly	PMU reporting dashboard
F2	Documentation Completeness	All mandatory documentation submitted (design docs, test cases, user manuals, etc.)	**100%**	Per milestone	Document tracker
F3	Audit Readiness	All deliverables auditable with supporting artefacts	**100%**	Quarterly	Internal Audit / PMU review

3. PERFORMANCE EVALUATION FRAMEWORK

Performance Rating	Threshold Range	Interpretation	Action / Escalation
Excellent	≥ 95% compliance with all KPIs	Exceeds contractual Obligations	Recognition; Performance scorecard credit
Satisfactory	85–94% compliance	Meets expectations	Continuous monitoring
Marginal	70–84% compliance	Performance concerns	Corrective Action Plan required

Unsatisfactory	<70% compliance	Non-performance	Formal escalation to Steering Committee and possible penalties

4. KPI ALIGNMENT TO CALL-OFF SOWs

Every Call-Off Order and Statement of Work (SOW) issued under this Framework shall:

1. Mirror the relevant KPIs from this Master Register (minimum 8 mandatory metrics per module).
2. Include module-specific KPIs (e.g., invoice processing time in Finance; PO turnaround in SCM).
3. Require monthly KPI reporting to the PMU as part of the deliverable acceptance process.
4. Allow for performance-based deductions or credits as specified in the Framework Agreement Schedule of Penalties.
5. Include a Performance Scorecard summarising cumulative KPI achievement per quarter.

5. GOVERNANCE & REPORTING RESPONSIBILITIES

Role	Responsibility
PMO	Overall KPI governance, validation, and consolidation of reports for EXCO and Audit Committee.
ICT & Service Provider	System-level monitoring (uptime, interfaces, data integrity).
Finance	Verification of cost efficiency and SLA-linked payments.
SCM	Inclusion of KPIs in all Call-Off contracts and supplier performance evaluations.
Service Providers	Monthly performance reporting and corrective action implementation.
Project Steering Committee	**Implementation Phase**- Monthly review of performance trends, penalties, and supplier improvement actions.
ICT Steering Committee	**Post-Implementation**- Quarterly review of performance trends, penalties, and supplier improvement actions

APPENDIX P — FRAMEWORK CHANGE CONTROL PROCEDURE & CRF TEMPLATE

1. Purpose

To define the **process and authority** for evaluating, approving, and implementing changes to:

- The ERP Framework Agreement.
- Any issued Call-Off Order; or
- Module-specific Statement of Work (SOW).

All changes must preserve **budget integrity, schedule predictability, and quality standards** as approved by EXCO and the Executive Sponsor.

2. Scope of the Procedure

Applies to **all ERP framework participants**, including:
PMU, ICT, SCM, Finance, Executive Sponsor, Project Steering Committee (PSC), and all Implementation Partners (OIP / vendors).

3. Change Control Principles

1. **No verbal or informal changes** are permitted — every change must be logged and approved through an authorised Change Request Form (CRF).
2. **Segregation of duties:** Requestor ≠ Approver ≠ Implementer.
3. **Audit readiness:** All CRFs must be uniquely numbered, traceable, and retained in the PMU repository.
4. **Impact-based evaluation:** Each change must clearly define its impact on scope, cost, schedule, risk, and quality.
5. **Controlled implementation:** No work shall commence until written approval is received from the authorised body.

4. Framework Change Control Workflow

Step	Activity	Responsible Party	Output / Artefact	Approval Authority
1	**Change Identification** – Request raised by any project stakeholder (PMU, ICT, Business Owner, or Service Provider).	Requestor	Draft CRF	Requestor

2	**Logging & Initial Screening** – PMU logs CRF, assigns reference number, and screens for completeness.	PMU	Registered CRF Log	PMU
3	**Impact Assessment** – Technical, financial, and schedule impact analysis performed.	PMU + ICT + Finance	Completed Impact Analysis	PMU
4	**Review & Recommendation** – Reviewed by Project Steering Committee for risk/benefit evaluation.	PSC	PSC Minutes / Recommendation	PSC
5	**Approval / Rejection** – Formal approval in writing per delegation of authority:	Executive Authority	Signed CRF + Approval Record	As per DoA
6	**Baseline Update** – PMU updates project schedule, scope register, and traceability matrix.	PMU	Updated project baselines	PMU
7	**Implementation & Verification** – Change executed, verified, and documented in Acceptance Certificate.	OIP / PMU / ICT	Verified implementation evidence	PMU
8	**Closure & Archiving** – CRF status updated to "Closed" with supporting evidence.	PMU	Closed CRF + Archive Log	PMU

5. Change Classification

Type of Change	Examples	Approval Level
Scope Change	Addition/removal of module functionality, interface, or reporting component	PSC / Executive Sponsor
Schedule Change	Extension of timeline, shift of milestones, resource Delays	PSC / PMU
Cost / Budget Change	Increase in value of Call-Off or resource rates	CFO / Executive Sponsor
Technical Change	Infrastructure, integration, or architecture Modifications	ICT / PMU
Contractual Change	Amendments to framework terms, SLAs, or Penalties	SCM / Legal / Executive Sponsor
Organisational / Resource Change	Replacement of key personnel or subcontractors	PMU / PSC

6. Change Control Governance Matrix

Governance Body	Role in Change Process
PMU	Maintains CRF log, coordinates analysis, updates baselines.
ICT	Performs technical impact and validation.
Finance	Assesses financial implications and budget alignment.
SCM	Ensure procurement and contractual compliance.
PSC	Recommends approval and prioritizes change requests.
Executive Sponsor / EXCO	Grants' final approval for major changes.

7. Key Controls and Audit Evidence

- All approved CRFs must be stored in the **ERP Change Register** maintained by the PMU.
- **Quarterly audit trail** provided to Internal Audit and Audit & Risk Committee.
- Each approved CRF must have a **corresponding baseline update** (scope / cost / schedule).
- No payment claims shall include change-related work without an approved CRF number.

8. CHANGE REQUEST FORM (CRF) TEMPLATE

Section	Description
CRF Number:	Automatically assigned by PMU Change Register
Date of Request:	___/ ___/ 20___
Requestor Name / Division:	_____
Module / Call-Off Affected:	_____
Change Type:	☐ Scope ☐ Schedule ☐ Cost ☐ Technical ☐ Contractual ☐ Resource
Description of Change:	Provide detailed description of requested change.
Reason / Justification:	Describe business, technical, or compliance rationale.
Impact Assessment:	Scope impact _____; Schedule impact _____; Cost impact _____; Risk impact _____; Quality impact _____.
Dependencies / Affected Modules:	_____

Section	Description
Proposed Implementation Plan:	Steps, responsible parties, and expected completion date.
Supporting Documents:	Attach any analysis, drawings, or approvals.
Reviewed By:	PMU ☐ ICT ☐ Finance ☐ SCM ☐ PSC
Approval Decision:	☐ Approved ☐ Rejected ☐ Deferred
Approver Name / Designation:	_____
Signature / Date:	_____
Implementation Status:	☐ Not Started ☐ In Progress ☐ Completed
Verification / Close-Out:	PMU Verification Date _____ ; Remarks _____

9. Records and Reporting

- The **PMU Change Log** must track CRF Number, status, approval date, and closure evidence.
- **Monthly Summary Reports** submitted to the Project Steering Committee.
- **Quarterly Change Portfolio Report** presented to EXCO and Audit & Risk Committee.

1. Purpose

To establish a centralized Risk Matrix governing the SABS ERP Framework, defining key programme-level risks, mitigation strategies, responsible parties, and escalation routes. Each Call-Off SOW shall mirror this matrix and demonstrate explicit risk-transfer and treatment responsibility between SABS and the appointed service provider.

2. Risk Management Principles

- **Proactive Identification:** Risks are logged during framework initiation and updated quarterly.
- **Accountability:** Each risk is assigned to a single accountable owner (PMU, ICT, Finance, SCM, or Service Provider).
- **Integration:** Risks are linked to project gates, milestone approvals, and the Change-Control process.
- **Escalation:** All red-rated risks are reported to the **Project Steering Committee** and **Executive Sponsor**.
- **Traceability:** Every Call-Off must include a **Risk-Transfer Confirmation Table** aligned to this matrix.

3. FRAMEWORK RISK MATRIX

#	Risk Category	Risk Description	Potential Impact	Inherent Rating	Mitigation / Control	Responsible Party	Residual Risk Rating
1	**Data Migration & Quality**	Legacy data inconsistent, incomplete, or inaccurate; migration failures.	Delays in go-live; transaction errors; financial misstatements.	High	Data-cleansing cycles, mock migration testing, MDW validation reports.	**ICT / PMU / Service Provider**	Medium

#							
2	**Integration Dependencies**	Interfaces between ERP, CIMS, LIMS, SABSTAN, and SharePoint misaligned or delayed.	Broken data flow, manual rework, reporting gaps.	High	Early interface design sign-off; integration testing sprints; joint ICT–OIP reviews.	**ICT / OIP**	Medium
3	**Funding Delays**	In-year CAPEX/CALL-OFF funding not released on time.	Project stoppages, penalties, reputational damage.	High	Confirm cash-flow schedule with Finance; progressive payment structure; contingency buffer.	**Finance / Executive Sponsor**	Medium
4	**Resource Capacity & Skills Gaps**	Insufficient internal skills to support configuration or testing.	Extended timelines; dependency on external consultants.	Medium	Skills-transfer clause in contracts; training plan per module; PMU oversight.	**PMU / HR / Service Provider**	Low
5	**Change Resistance / User Adoption**	Users reject new ERP processes or revert to manual workarounds.	Low utilization: benefits not realized.	High	Stakeholder engagement; change-readiness assessments; post-go-live	**PMU / HR / Business Owners**	Medium

#							
					coaching.		
6	**Scope Creep / Uncontrolled Changes**	Unauthorised additions to functionality or reports.	Cost and schedule overruns.	High	Formal CRF approval; Stage-Gate enforcement; Steering Committee validation.	**PMU / PSC / SCM**	Low
7	**Cybersecurity / Data Privacy**	Breach of ERP or cloud-hosted data.	Regulatory breach; reputational loss.	High	OEM Cloud SOC 2 controls; ICT Security policies;	**ICT / Service Provider**	Low

#							
					encryption; user access audit.		
8	**Vendor non-performance**	Implementatio n n partner fails to meet milestones or quality.	Delays; rework; potential contract disputes.	Mediu m	KPI-linked payment milestones; performance penalties; regular PMU QA reviews.	**PMU / SCM**	Low
9	**Infrastructure / Hosting Instability**	Cloud or network outages affecting ERP availability.	Business downtime; transaction backlog.	Mediu m	SLA: ≥ 99.5 % uptime; dual-site hosting; ICT monitoring dashboards.	**ICT / Service Provider**	Low

1 0	Regulatory / Compliance Gaps	Non-alignment with PFMA, Treasury, or SABS policies.	Audit findings; legal exposure.	Medium	SCM oversight; PMU governance framework; internal audit assurance.	SCM / PMU	Low
1 1	Stakeholder Misalignment	Conflicting priorities among divisions or unclear accountability.	Delayed decisions; escalation overhead.	Medium	PSC coordination; EXCO reporting; communication matrix.	Executive Sponsor / PMU	Low
1 2	Post-Go-Live Support Weakness	Lack of stable support after handover.	Prolonged downtime; unresolved defects.	Medium	90-day hyper-care; defined support SLAs; transition to ICT Ops.	ICT / Service Provider	Low

1 3	Audit & Documentation Deficiency	Missing documentation or traceability gaps.	Audit findings; non-compliance with PFMA.	Medium	PMU document repository; QA checklists; periodic audits.	PMU / Internal Audit	Low

4. Risk Governance Responsibilities

Governance Body / Role	Risk-Related Duties
PMU	Maintain master risk register, monitor mitigation progress, and report monthly to PSC.
ICT	Manage technical, integration, and cybersecurity risks.
Finance	Monitor financial and funding-release risks.
SCM	Manage contractual and compliance-related risks.
Project Steering Committee (PSC)	Review quarterly risk reports, approve escalations, and direct corrective action.

Executive Sponsor / EXCO	Oversight of strategic and funding risks; escalation point for red-rated issues.
Service Providers (OIP / Vendors)	Identify and manage operational risks under their Call-Offs; provide risk logs and mitigation evidence.

5. Risk Rating Methodology

Risk Level	Probability	Impact	Colour Code	Response Strategy
High	> 70 % likelihood	Major impact on cost/schedule/scope	🔴 Red	Avoid / Transfer / Escalate to PSC
Medium	30–70 %	Manageable impact	🟠 Amber	Mitigate / Monitor
Low	< 30 %	Minor / localised	🟢 Green	Accept / Track

6. Call-Off Risk-Transfer Confirmation

Each **Call-Off SOW** shall include the following clause and table:

Risk-Transfer Confirmation Statement:

"The Service Provider acknowledges receipt of the SABS Framework Risk Matrix and accepts responsibility for all operational, technical, and data-related risks under this Call-Off Order, including those identified below. Any unallocated risk remains with SABS."

Risk ID	Framework Risk Title	Transferred to Service Provider? (Y/N)	Residual Risk Holder	Mitigation Reference / Deliverable	Verification Method
1	Data Migration & Quality	Y	ICT / PMU	Data Migration Plan	Mock migration reports
2	Integration Dependencies	Y	ICT	Interface Testing Plan	SIT results
3	Funding Delays	N	Finance	Budget Release Schedule	CFO confirmation
4	Cybersecurity / Data Privacy	Shared	ICT / Vendor	Security Policy & SLA	SOC 2 report
…	*(Continue for all applicable risks)*				

7. Reporting and Escalation

- The **PMU** shall maintain a live **Framework Risk Register**.
- **Monthly summaries** to PSC and **quarterly reports** to EXCO.
- All *red-rated* risks trigger **mandatory CRF linkage**.
- Residual risks at module go-live must be signed off by **ICT, PMU, and the Executive Sponsor**.