

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

## **1. BACKGROUND**

The Department of Mineral Resources and Energy currently uses Veeam Backup & Replication, which is deployed at Head Office and SITA and regional sites. Backed-up data from regional sites are replicated to SITA. DMRE currently makes use of physical LTO backup tapes for the long-term retention of backup data and offsite storage. The backup hardware infrastructure is aged and needs to be replaced as part of the managed backup service.

The Department of Mineral Resources and Energy's data and infrastructure is running on Dell, EMC storage, and HP hardware. The virtualization technology is VMWare in SITA (main site) and Microsoft Hyper-V for regional offices which are licensed, the proposal should include any potential shortfall. The long-term backup retention and offsite storage of backups utilizes LTO tape technology, the service provider can propose the best reasonable solution and is not restricted only to tapes for offsite storage.

The backup hardware infrastructure is out of warranty and has reached the end of life, which means that spares or replacement parts are no longer available in the market and support is limited from the vendors/suppliers.

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

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

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

**Table 1: List of sites**

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

The Department intends to appoint a service provider with suitable skills and experience to provide backup and disaster recovery services for all DMRE core applications.

## **2. CONTRACT PERIOD**

The duration of the contract is 36 months.

## **3. OBJECTIVE**

The objective is to supply backup service for Department to ensure data availability in the event of a failure or disaster. This service includes refreshing the entire backup infrastructure while maintaining existing backup image history (data migration), continuous daily backup, testing, and end-to-end management of the implemented service. The DMRE is not prescriptive on the backup hardware infrastructure brand; however, the proposed hardware infrastructure **MUST** be compatible with the current to allow comprehensive migration to the newly proposed solution and meet the minimum acceptable criteria.

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

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

The Department also requires that Disaster Recovery to Microsoft Azure be configured for four regional sites (Witbank, Braamfontein, Klerksdorp and Cape Town). The service provider may propose a solution that will meet the minimum acceptable criteria for DR as per the DPSA cloud framework/policy.

To facilitate disaster recovery, DMRE also requires the provisioning of redundant 50 Mbps Internet Fibre lines at Head Office (Matimba and Trevena as listed in Table 1 above) for internet connectivity.

The RPO and RTO and outlined in the Department's backup policy which will be shared with the successful bidder at implementation.

## **4. SCOPE OF WORK**

The Department needs backup:

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

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

4.1.2 Day-to-day backup administration

4.1.3 Backup performance tuning and optimisation

4.1.4 Backup solution software patching

4.1.5 Ad-hoc backup configuration

4.1.6 Planned and ad-hoc restores

4.1.7 General backup troubleshooting

4.1.8 Monthly reporting

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

### **4.2 Backup Data storage**

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

4.2.2 The backup storage must be capable of:

4.2.2.1 In-line deduplication

4.2.2.2 Immutable snapshots

4.2.2.3 Veeam data mover service integration

4.2.2.4 Capacity on demand storage growth

- 4.2.2.5 Second backup copy needs to be on tape or the proposed offsite solution.

### **4.3 Regional servers**

- 4.3.1 Service provider will be required to provide on-premises backup servers to all regional offices as specified by DMRE.
- 4.3.2 Ensure that all backup servers are configured and functional before handover.

### **4.4 Availability and Disaster Recovery**

- 4.4.1 DMRE requires 99.5% availability. SLA breach by the service provider to meet this target will result in penalties payable as per predetermined penalty clauses.
- 4.4.2 The service provider must make use of tier-two data centers to provide the stipulated services to DMRE.
- 4.4.3 Disaster recovery tests of DMRE hosted servers in Disaster Recovery site must be conducted every six months by the service provider and the results reported to DMRE.

### **4.5 Backup Requirements**

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

#### **4.5.1.1 Backup schedule:**

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

#### **4.5.1.2 Retention periods:**

4.5.1.2.1 Daily backups retained for four (4) weeks

4.5.1.2.2 Weekly backups retained for four (8) weeks

4.5.1.2.3 Monthly backups retained for twelve (12) months

4.5.1.2.4 Yearly backups retained for five (5) years

#### **4.5.2 System Performance**

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

#### **4.5.3 Data Ownership**

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

4.5.3.2 All data stored by the system is solely owned by the DMRE and should be always accessible.

4.5.3.3 The service provider's offered services must be compliant with the POPI Act.

4.5.3.4 The Service provider must be ISO 9001 certified and provide proof.

## **5. DELIVERABLES OR PROJECT OUTPUT AND OR OUTCOME**

### **5.1 The expected outputs are:**

5.1.1 Provide managed services for Veeam Backup and Replication.

5.1.2 Provide licensing for the renewal of Veeam Availability Suite.

5.1.3 Provide long-term backup retention of backup data.

5.1.4 Provide backup hardware infrastructure.

5.1.5 Facilitate Disaster Recovery from the central backup repositories and all sites.

5.1.6 Provide two 50Mbps Internet Fiber lines for Internet Connectivity.

5.1.7 All software and hardware supplied must include maintenance and support for a minimum of 3 years.

5.1.8 DMRE Solution Requirements Document Information and Communications Technology

5.1.9 DMRE Group Policy Implementations document

5.1.10 Successful implementation of the project plan.

5.1.11 Project Charter

5.1.12 Stakeholder management plan including project organization structure and roles and responsibilities.

5.1.13 Communications management plan

5.1.14 Risk management plan

5.1.15 Detailed project schedule and WBS

5.1.16 Sample solution technical/ solution management reports

5.1.17 Bi-Weekly and monthly status and progress reports

5.1.18 Project closing presentation

5.1.19 Project conclusion documentation outlining work completed, lessons learned and recommendations for next steps.

5.1.20 SLA document will be drawn up with a successful bidder. Service provider to provide draft with clear deliverable, categories/ classification of service, turnaround times as a minimum

5.1.21 Review or develop Backup policies, procedures and processes

5.1.22 Backup architecture

5.1.23 Assessment report of current setup, data utilization and improvements thereof with aim to reduce any existing inefficiencies

5.1.24 Warranty Document detailing what will be covered and duration as minimum and License Packs/Portal

5.1.25 Skill transfer plan and implementation thereof

## **6. EVALUATION CRITERIA**

**This bid will be evaluated in four stages, i.e. functionality, mandatory requirements, administrative compliance and point scoring system.**

### **6.1 Gate 01 - Functionality**

Bidders will be scored in terms of the functional requirements indicated in the table below. The corresponding points and weightings will be used to calculate the overall score a bidder has achieved. The minimum threshold for this bid is **70%**. Bidders who score less than **70%** will be disqualified. Only bidders that score **70%** and more will be considered further.

NO	CRITERIA	SCORING	WEIGHTS
1	<p><b>Company Experience:</b></p> <p>Service provider should have successfully implemented with a regional presence/ multiple sites in the past 7 years.</p> <p>Service provider is required to provide proof in form of testimonial indicating that they have successfully implemented Veeam backup project. The testimonial(s) or reference letter(s) must be signed and on letterhead of company that received the services, duration of the project executed and contact details for verification purpose supported by SLA or contract or purchase order.</p>	<p>Successfully implemented more than 5 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years.</p> <p>= 5 points</p> <p>Successfully implemented 5 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years.</p> <p>= 3 points</p> <p>Successfully implemented 4 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years.</p> <p>= 2 points</p> <p>Successfully implemented 3 Veeam backup projects with the number of users that is between 1500 and</p>	10

		<p>1999 and with a regional presence/ multiple sites in the past 7 years.</p> <p>= 1 point</p> <p>Successfully implemented less than 3 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years OR not attached = 0 point</p>	
2	<p><b>PROJECT MANAGER</b></p> <p><b>QUALIFICATIONS:</b></p> <p>Project Manager must have certification in Project Management and the certification of the proposed solution(s)</p>	<p>Project Management certification, project management practitioner, and the certification of the proposed solution(s) = 5 points</p> <p>Project Management certification and the certification of the proposed solution(s) = 3 points</p> <p>Project Management certificate BUT no certification of the</p>	5

		<p>proposed solution(s) = 2 points</p> <p>Certification of the proposed solution(s) BUT no Project Management certificate = 1 points</p> <p>No Project Management certification and /or No certification of the proposed solution(s) OR not attached = 0 point</p>	
	<p><b>EXPERIENCE</b></p> <p>The project manager should have relevant experience specifically in the implementation/ management of Veeam backup projects</p>	<p>Successfully implemented/ managed more than 5 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 5 points</p> <p>Successfully implemented/ managed 5 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years.</p>	10

		<p>= 3 points</p> <p>Successfully implemented/ managed 4 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 2 points.</p> <p>Successfully implemented/ managed 3 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 1 point</p> <p>Successfully implemented/ managed less than 3 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years OR not attached = 0 point</p>	
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3.	<p><b>TEAM MEMBERS</b></p> <p><b>QUALIFICATIONS:</b></p> <p>(i) Should have a SAQA recognised tertiary education qualification Information Technology</p> <p>(ii) Must have certification in backup solution proposed</p> <p><b>EXPERIENCE</b></p> <p>(iii) The team members should have relevant experience specific to the implementation / management of backup solution proposed</p>	<p>NQF 6 or higher in Information Technology and proposed backup solution certification = 5 points</p> <p>Certification in proposed backup solution and below NQF 6 in information technology = 2 points</p> <p>Below or higher NQF 6 in Information Technology and No proposed backup solution certification = 1 point</p> <p>No certification in proposed backup solution = 0 points</p> <p>Successfully implemented/ managed more than 5 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 5 points</p>	<p><b>5</b></p> <p><b>25</b></p>
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		<p>Successfully implemented/ managed 5 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 3 points</p> <p>Successfully implemented/ managed 4 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 2 points</p> <p>Successfully implemented/ managed 3 Veeam backup projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years. = 1 point</p> <p>Successfully implemented/ managed less than 3 Veeam backup</p>	
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		projects with the number of users that is between 1500 and 1999 and with a regional presence/ multiple sites in the past 7 years OR not attached = 0 point	
4	<p><b>TECHNICAL PROPOSAL INCLUDES CLEAR PROJECT PLAN AND METHODOLOGY</b></p> <p>The detailed/ and or practical technical proposal must include clear Project methodology to be used to execute and deliver the artifacts of the project in line with the scope of work.</p> <ul style="list-style-type: none"> <li>➤ Defined tasks</li> <li>➤ Timelines</li> <li>➤ Resources responsible for tasks as per provided CV.</li> <li>➤ Clear dependencies.</li> <li>➤ Rollout plan for implementation at all the sites.</li> <li>➤ Migration plan of historical backup data from old to new infrastructure.</li> <li>➤ Skills transfer plan and implementation thereof</li> </ul>	<p>Project methodology in line with scope of work = <b>5 points</b></p> <p>Project methodology not in line with scope of work OR not attached = <b>0 points</b></p>	45

	(The proposal should detail the dependencies from the Department to ensure successful implementation of project)		
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**Formula;**  $\frac{A}{B} \times 100 = C\%$

Where:      A = Total score for the bid under consideration  
                  B = Maximum possible score  
                  C = Percentage score for the bid under consideration

## 6.2 Gate 02 – Mandatory requirements

The following requirements are mandatory. Bidders who do not comply with the mandatory requirements will be disqualified.

- (i) Bidders must be accredited by the OEM (submit proof on letter head of the OEM)
- (ii) Bidders must have OEM Gold or higher accreditation for software and hardware.
- (i) Bidders must have OEM Gold or higher accreditation for all solutions offered.

## 6.3 Gate 03 - Administrative compliance

- (i) Compliance to the specification / Terms of Reference.
- (ii) Fully completed SBDs (Duly signed and dated) listed hereunder:
  - SBD 1
  - SBD 4
  - SBD 6.1
- (iii) The following will be regarded as noncompliance.
  - Price amendments / other amendments without signature/initials.
  - Use of correctional fluid

- Completion of the bid document in coloured ink other than black ink

#### 6.4 Gate 04 – Point Scoring System

Bids will be evaluated on the 80/20 preference point system as outlined in the Preferential Procurement Regulation of 2022.

- Price points = 80
- Preferential points = 20

6.4.1 The bidder that scores the highest points in this phase will be awarded the tender.

6.4.2 Should more than one bidder score the same number of points, the award will be made to the bidder who scores more points on specific goals.

6.4.3 Should there be more than one bidder who score the same number of points overall and same points on specific goals, the award will be made to the bidder who scored the highest points on functionality.

6.4.4 Should there be more than one bidder who score the same number of points in all aspects, the bid will be determined by the drawing of the lot.

6.4.5 The preferential points will be allocated in terms of the Departmental objectives on specific goals. Points allocation on specific goals are tabulated hereunder.

6.4.6 Bidders who do not submit proof (means of verification) of specific goals claimed will not qualify for preference points for specific goals.

Specific Goal	Number of points (80/20 Preference System)	Means of Verification
Enterprise owned by Black people	4	Identity documents and CIPC document
Enterprise owned by Women	4	Identity documents and CIPC document
Enterprise owned by Youth	4	Identity documents and CIPC document

Enterprise owned by disabled persons	4	Medical certification
Enterprise owned by SMMEs (QSE or EME)	4	B-BBEE certificate issued by a SANAS accredited Agency or DTIC, or Sworn affidavit

**NB:** “Ownership = 51% of the company share. Designated group/person that are part of the entity directorship but have less than 51% share = points will be calculated on a pro-rata basis in relations to the share/s held by the designated group/persons.

Eg.    Number of women directors                = 01  
           Shares owned by women                    = 20%  
           Specific goal for women                    = 4 points  
           Points claimable for women ownership =  $\frac{20}{100} \times 4 = \mathbf{0.8 \text{ points}}$

## 7 REPORTING REQUIREMENTS

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

## **8 ROLES AND RESPONSIBILITIES**

### **8.1 The Department will be responsible for:**

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

### **8.2 The Service provider will be responsible for:**

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

## **9 CONFIDENTIALITY OF INFORMATION**

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

## **10 PAYMENT**

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

## **11 TAX CLEARANCE CERTIFICATE**

- 11.1 Bidders must ensure compliance with their tax obligations.
- 11.2 Bidders are required to submit their unique personal identification number (pin) issued by SARS to enable the organ of state to view the taxpayer's profile and tax status.
- 11.3 Application for tax compliance status (TCS) or pin may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as e-filers through the website [www.sars.gov.za](http://www.sars.gov.za).
- 11.4 A bidder may also submit a printed TCS together with the proposal.
- 11.5 In proposals where consortia / joint ventures / sub-contractors are

involved; each party must submit a separate proof of TCS / pin / CSD number.

- 11.6 Where no TCS is available but the bidders is registered on the central supplier database (CSD), a CSD number must be provided

## **12 COST / PRICING**

- 12.1 Bidders are requested to provide a quoted proposal regarding the work to be undertaken.
- 12.2 Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. The total cost must be VAT inclusive and should be quoted in South African Rands (i.e. ZAR).
- 12.3 Bidders should provide hourly rates as prescribed by Department of Public Service and Administration (DPSA), Auditor- General (AG) or the body regulating the profession of the consultant.
- 12.4 Bidders should provide (Subsistence & Travel (S&T)) rates that are in aligned to the National Treasury instruction note as follows:
- i) Hotel Accommodation – R1550 per night per person, including breakfast, dinner and parking.
  - ii) Air travel must be restricted to economy class.
  - iii) Claims for kilometres may not exceed the rates approved by the Automobile Association of South Africa.

## **13 CONDITIONS OF THE CONTRACT**

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

## **14 FORMAT OF SUBMISSION OF PROPOSAL**

- 14.1 Bidders are requested to submit two (2) copies of technical proposals plus the original.
- 14.2 Bidders are requested to index their proposals for easy reference.

## **15 PRE-BID MEETING / BRIEFING SESSION DETAILS-**

- 15.1 A compulsory briefing session will be held on **03 November 2023** at **10:00** at Department of Minerals Resource and Energy, at 192 Matimba Building, Corner Visagie and Paul Kruger Streets, Pretoria 0001.
- 15.2 Bidders must ensure that they sign a register during a compulsory briefing session to confirm attendance. Failure to sign the register to confirm attendance will invalidate your bid.

## **16 CLOSING DATE**

Proposals must be submitted on or before **16 November 2023** at **11:00** at Department of Minerals Resources and Energy, at 192 Visagie Street, Matimba Building, Corner Visagie and Paul Kruger Streets, Pretoria, in the bid box Department of Minerals Resource and Energy. **No late bids will be accepted.**

## **17 ENQUIRIES**

- 17.1 **All general enquiries relating to bid documents should be directed to:**

Ms. Lucia Nkhethoa/ Mr Samuel Msiza

Tel No: (012) 406 7702 /406 7910

E-mail: [Lucia.Nkhethoa@dmre.gov.za/Samuel.msiza@dmre.gov.za](mailto:Lucia.Nkhethoa@dmre.gov.za/Samuel.msiza@dmre.gov.za)

- 17.2 **Technical enquiries can be directed to:**

Mr P.N. Leso

Tel No: (012) 406 7730 / 072 531 0434

E-mail: [Phillip.leso@dmre.gov.za](mailto:Phillip.leso@dmre.gov.za)