INFORMATION AND COMMUNICATION TECHNOLOGY

TERMS OF REFERENCE (TOR)

NT002-1-2025

APPOINTMENT OF A SERVICE PROVIDER TO UPGRADE IVANTI HEAT 2023 LICENCES TO IVANTI NEURONS AND PROVIDE SUPPORT AND MAINTENANCE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A PERIOD OF THREE (3) YEARS

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INTRODUCTION

This Terms of Reference (TOR) provides the specifications for the provision of appointing a service provider to upgrade **IVANTI HEAT** 2023 licences to **IVANTI Neurons** and provide support and maintenance for the National Treasury (NT) Information and Communication Technology (ICT) for a period of three (3) years.

The appointed service provider will manage the upgrade of the existing software and licenses, provide new licenses as the environment grows, as well as providing the relevant maintenance and support when required.

NT uses the IVANTI HEAT system as a solution for incident management, change control and call centre management. An upgrade and configuration of the firmware from the current Ivanti Service Manager (ISM) 2021.1 version to the latest ISM 2023.1 was concluded in April 2024. The purpose of the upgrade to IVANTI Neurons is to ensure continued support and maintenance is received from Ivanti as the older versions have been phased out.

1. PURPOSE

The purpose of this document is to provide Terms of Reference to service providers wiling to bid for the upgrade of IVANTI HEAT 2023 licences to IVANTI Neurons and provide support and maintenance for the National Treasury (NT) Information and Communication Technology (ICT) for a period of three (3) years.

2. SCOPE OF WORK

The scope of this Request for Proposal is to invite IVANTI Accredited service providers to submit their proposals and pricing based on the requirement to be listed below.

2.1 Project Deliverables

Expected outputs/outcomes/benefits from the new IVANTI Neurons include:

- Version upgrade to the latest
- Renewed Licenses
- License Management Documentation
- Transition or handover plan
- A Service Level Agreement (SLA) defining scope, response times, escalation procedures, and coverage hours
- Configurable Escalation Engine to better manage Service Level Agreements which will result in greater customer satisfaction.

- Documentation or resources for troubleshooting common issues.
- Out of the Box Key Performance Metrics.
- Regular or on-demand incident reports detailing resolved issues, root cause analyses, and improvement suggestions and performance monitoring reports to report on system performance, identify potential risks or bottlenecks.
- Web based to support zero client deployment.
- SQL Server Reporting Services for automated reporting.
- Advanced Workflow Designer and Engine to streamline current manual processes.
- Enhanced Configuration Management for Change Impact Analysis.
- Embedded Knowledge Management to reduce number of Incidents raised with the Service Desk; and,
- Administration Enhancements that will greatly reduce the time to make system changes.
- Maintenance Schedule outlining regular maintenance activities such as updates and system checks.
- System updates and upgrades to ensure the system remains secure and operational.
- Project Management deliverables
- Business Analysis deliverables
- Developed and implemented new deployments
- Support and maintenance services
- Remote support and maintenance

2.2 Solution Requirements

2.2.1 Business Requirements

The Service Provider will have to perform the following activities to deliver the required support and implementation:

- Upgrade the current IVANTI HEAT to IVANTI Neurons (latest version)
- To provide specialised software support on the Ivanti Neurons solution to ensure optimal configuration and deployment of the software within the operational environment with a minimum of 300 hours per annum.
- The supplier and the Senior System Engineer / Application Developer must have the accredited skills to provide software support on the Ivanti product.
- Analyse the licensing status and conduct software license renewal.
- Thoroughly document requirements of new deployments and installations

- Optimally configure the new deployments.
- Recommend improvements to the existing configuration.
- Provide optimal designs and recommendations for new deployments
- Ensure software is implemented against pre-defined processes, service levels and metrics.
- Provide support and maintenance on the Ivanti ISM and Voice integration as and when required.
- Assist in responding to audit and risk findings with proposals to mitigate said findings.
- Provide monthly reports on the status of the Ivanti environment.
- Provide input to and review standards and procedures associated to this software within the environment.
- Formally document and operationalise solutions and train support staff and users; and
- Support to be given 24/7 365 days.

2.2.2 Licensing Requirements

NT has the following Ivanti 2023 licences for different business units which must be renewed and maintained:

Table 1: Licenses and Modules Descriptions

SKU	Description	Type	Qty
SM-SD-CONC-S-1Y	Service Manager - Service Desk Concurrent Premise Subscription	Subscription	50
SM-SD-FXD-S-1Y	Service Manager - Service Desk Fixed (Named) Premise Subscription	Subscription	97
SM-SMAMCU-S	Ivanti Neurons for ITSM & ITAM Concurrent Analyst On-Prem Subscription	Subscription	5
SM-VOICE-SUP-S-1Y	Service Manager - Voice Automation Supervisor Premise Subscription	Subscription	11
SM-VOICE-AGENT-1Y	Service Manager - Voice Automation Agent Premise Subscription	Subscription	86
SM-VOICE-PORT-S-1Y	Service Manager - Voice Additional Voice and Routing Port Premise Subscription	Subscription	20

2.2.3 Implementation Requirements

The case of implementing new services, functionality and/or version upgrades the appointed service provider will need to conduct Business Analysis workshops with the different Business Units within the NT, to discuss and document the requirements of said Business Units. The appointed service provider will then produce a required documentations containing a detailed Gap Analysis between the current Ivanti 2023 functionality and the new requirements. Once the documents are approved by all parties, the team from the appointed service provider must perform the necessary system configurations to meet the requirements as detailed in the Solution Architecture Document/Functional Requirement Specification.

The appointed service provider team must install and configure the necessary import connections and email settings and migrate data to the upgraded platform. When they have completed all configurations, they will compile test cases and provide User Acceptance Testing (UAT) and Training. During the UAT period, they must document and fix any issues that may manifest. When the UAT process is completed, they must provide End User Training to all users before moving to production. The appointed service provider team must be onsite at the National Treasury for at least, the first two days of production to assist with any teething issues. Thereafter the project must be signed off and the National Treasury must contact the appointed service provider Support Services for post-production issues.

2.3 Project Resource Requirements

- The service providers are required to submit proposals that demonstrate their technical capability to carry out the task at hand.
- This includes presenting a project implementation methodology that aligns with modern agile development practices, as well as maintenance and support services that ensure 100% uptime and availability of the solution and its associated components.
- It is imperative that the service provider furnish a dedicated project manager who will oversee the activities of the development, maintenance, and support team, a business analyst that will analyse, document and test system requirements for new deployments and a developer/Ivanti engineer for software development and software maintenance and support.
- The resources required for the scope of work include the following roles:

a) Project Manager

Table 2: Resource Requirements

Core Description
Job Title: Project Manager
A Project Manager with adequate experience in the ICT field and business solutions. The Project Manager must ensure that a project is completed on time and within scope and budget, that the project's objectives are met and that the project team is properly as per their roles. The Project Manager must oversee the project to ensure the desired results are tracked and delivered, must provide regular reporting on the progress of the project and ensure that the most efficient resources are used, and the different interests involved are satisfied. **Qualifications:** • Minimum 5 years of experience, with at least five years of managing complex projects in a technical environment. • Relevant Certified Project Management Certifications • Relevant experience in Microsoft Project (MSP) • Minimum of National Diploma NQF6 in ICT and related fields (IT, Computer Science, and Engineering discipline) **Experience/ skills required:** • Experience in Information Technology management projects. • Extensive Project Management Skills (Minimum 5 years) Project/Program Planning skills; Financial Management Skills; Scope Management skills; Time management skills, Quality Management skills; Risk and Issue management skills; Project Budgeting skills; Integration Management skills; Human Resource Management skills; Communication skills; Report writing skills. • MS Office Computer Literacy. • Experience with full product lifecycle with understanding of development lifecycle and various technology methodologies that support that lifecycle • Ability to multi-task. • Assist with any other tasks to be assigned by the management team

b) Business /System Analyst

Core Description
Job Title: Business / System Analyst
The Business / System Analyst with adequate experience in the ICT field, business analysis and/or systems analysis, systems testing and training, documentation of requirements, test cases and user manuals. The Business / System Analyst is responsible for analysing business requirements, processes, systems, and structures, and recommend improvements. The Business / System Analyst is also involved in the implementation and quality assurance improvements. **Qualifications:** • Minimum of National Diploma/NQF6 in Information Technology/Computer Science or any related field • Business and System Analysis certifications. **Experience/ skills required:** • 5 years' experience in Business System Analysis, business process management and business process engineering • Experience with SDLC, Agile and other system development methodologies • Experience in ICT solutions delivery, business logic modelling, design and implementation • Experience working with multiple applications/ systems preferred. • Oral and written communication skills • Software testing experience • Knowledge of QA testing methodologies and the test lifecycle

c) ICT Service Support (IVANTI Senior Consultant)

Core Description
Job Title: Ivanti Senior System Engineer / Application Developer
The Senior System Engineer / Application Developer is responsible for implementing, configuring, maintaining, and optimising the Ivanti Service Manager (ISM) platform to support the organisation's Ivanti software and business process automation needs. The Senior System Engineer / Application Developer must have adequate technical expertise in the Ivanti platform with problem solving and collaboration skills to ensure the system delivers maximum value.

Qualifications:

- Relevant Qualifications:
- Ivanti Classic, ITSM, and Ivanti 20.x Certification
- ITIL V2 or V3 Foundation Certification
- Minimum of National Diploma/ NQF6 in Information Technology/Computer Science or any related field. Must be in possession of Software Development certification(s).

Experience:

- Minimum of 5 years of experience in Ivanti Service Manager, ITSM, Ivanti Voice, Ivanti Discovery, DSM, and Ivanti 20.x.
- Experience with Migrating Ivanti Classic and ITSM Platforms to Ivanti 20.x
- Dedicated Service Desk for Office Hours Support
- Registered Ivanti Software Value Added Supplier (registered to sell and support Ivanti Software products)
- Software testing experience.
- Able to test in a fast-paced environment with both long and short development cycles.
- Knowledge of QA testing methodologies and the test lifecycle
- Knowledge and experience with a variety of different test strategies and approaches (Exploratory, Ad-hoc, Boundary, Functional, Non-functional, etc.).
- Ability to clearly communicate software issues and behavior to development, product management, and operations; and
- Desire to learn, share knowledge, and take initiative.
- Experience working with defect management

2.4 Bidder Requirements and Specification

- The Bidder represents that,
    - it has the necessary expertise, skill, qualifications, and ability to undertake the work required in terms of the scope of work or system requirements.
    - it is committed to providing the Products or Services; and
    - perform all obligations detailed herein without any interruption to the Customer.
- The Bidder must deliver the service professionally, following best practices and high standards typical of well-managed businesses providing similar services.
- The Bidder must perform the Services in the most cost-effective manner consistent with the level of quality and performance as defined in the scope of work or System requirements.

- Sufficient capacity to provide support and maintenance of software solution (Support structure/organogram)
- A brief narrative profile of the potential bidder must be submitted in the prescribed format in (Annexure A2) as part of the bid documentation and attached supporting documentation.

3. SUBMISSION REQUIREMENTS

3.1 Resources Requirements

- The bidder must provide the skills set required by the NT.
- Only CV's may be submitted if the employee is employed or affiliation with the company submitting the CV. Proof of employment or affiliation with the company could be requested.
- The bidder must include project experience proof to support the Job Profiles for the skills sets required; and
- The contact details of the relevant management of the bidder must be provided as part of the bid documentation.
- Submitted CVs for individual consultants must indicate that they have specific experience in the provision of the required competencies and service provider(s) are required to submit the contact details of at least three (3) recent references who will confirm that the individual consultants have carried out similar work to that stated in their CVs.
- Service provider(s) should ensure that the CVs they submit are for individuals who would be willing to carry out ICT assignments. CVs of an organisation's senior managerial staff, albeit highly qualified individuals, should not be submitted unless these individuals are prepared to give full commitment to actively carrying out ICT assignments.
- ICT reserves the right to contact references as per the prescribed reference template (Annexure 2) during the evaluation and adjudication process to obtain information.

3.2 Bid Submission

- Service providers must respond to the TOR and follow the prescribed formats provided ICT requires specific professional services for the software development related projects as indicated in the TOR and these must be addressed by the service provider.
- Key personnel must be carefully chosen by the service provider and well-motivated through the curriculum vitae (CVs). The format of the CVs must be strictly in accordance with the format indicated in **(ANNEXURE A1)** below. Non-compliance with the format provided and a lack of signed declaration by the described individual will result in disqualification of the CV.

CV's must be signed by the proposed resource.

- The service provider must include project experience proof to support the job profiles for the skill sets required.
- The contact details of the relevant management of the service provider must be provided as part of the bid documentation.

- A detailed price proposal should be provided indicating the cost of each of the deliverable including the co-ordination thereof. The bidder should provide quotations for the following:
  - Licenses required.
  - Maintenance service according to the SLA to be agreed upon; and
  - Support rate.
- Provide a letter and contact details of at least 3 existing clients where a similar service has been successfully completed and arrange a site visit to one of the clients, should a visit be required by the NT.
- The bidder must undertake to conclude a Master Service Agreement (MSA) and Service Level Agreement (SLA) in agreement with the NT. The MSA and SLA must consist of, but is not limited to the following:
  - Clear description of the required services and deliverables
  - Defined payment terms for the service.
  - Agreement on the timeline.
  - Agreement that the successful bidder shall be the single point of contact for the service.
  - Agreement that the successful bidder must provide qualified personnel who have undergone necessary training and certification to provide the required service. Should the skill/s not be available in-house, this must be specified.

3.3 Security Requirements

All resources will be required to sign an Oath of Secrecy and submit security vetting information as per the NT security policy.

4. SUMMARY OF EVALUATION CRITERIA

4.1 Bid Evaluation Stages

The bid evaluation process consists of three stages; a bidder must qualify for each stage to be eligible to proceed to the next stage of the evaluation. The stages are as follows:

Table 3: Bid Evaluation Stages

Stage	Description
Stage 1	Administrative Requirements Evaluation
Stage 2	Functionality/Technical Evaluation
Stage 3	Preference Points System (Price and Specific Goals) Evaluation

4.2 Stage 1: Mandatory Requirements Evaluation

An administrative evaluation will be carried out on all the bids received and if the under mentioned documentation is not signed and/or attached such a bid will be eliminated from any further evaluation.

a) Bidders must provide a Pricing schedule SBD 3.3.

b) CVs of the proposed/nominated resource(s) must be submitted in the prescribed format. CV's (template provided) must be signed by the proposed resource and not signed on behalf of the proposed resource. Unsigned or incomplete CVS and CVs submitted in a different template will not be considered. It should be noted that no consideration will be made to any bidder, that has provided profiles for their resources, which are also provided by another competitor in this same bid, this is considered collusive tendering.

c) Bidders must provide a valid letter/certification that indicates that they are a certified partner Ivanti Software Value Added Supplier.

d) Bidder must provide valid proof of being an IVANTI Accredited partner/reseller.

e) In the case of a Joint Venture, Consortium, Trust, or Partnership a Valid Tax Clearance Certificate and/or SARS issued pin code for both companies must be submitted (which will be verified)

f) In the case of a Joint Venture, Consortium, Trust, or Partnership, a signed teaming agreement must be submitted.

g) In the case of a Joint Venture, Consortium, Trust, or Partnership a Consolidated Central Supplier Database Registration (CSD) or both companies CSD are required.

FAILURE TO ADHERE TO THE CONDITIONS OF THE BID WILL LEAD TO DISQUALIFICATION.

4.2.1 Additional Requirements (Not for elimination)

a) Proof of company registration on Central Supplier Database Registration (CSD).

b) Proof of valid registration with Compensation for Occupational Injuries and Disaster (COIDA).

c) Valid work permit and existing security clearance for foreign nationals are compulsory. If not provided, the lowest score will be allocated.

d) Bidders are required to submit proof of educational qualification(s) for all resources required. All copies of qualification(s) must be certified, and the certification must be valid for six (6) months from the required bid submission date. If not, the lowest score will be allocated.

e) All foreign qualifications must be accompanied by the South African Qualifications Authority (SAQA) certificate of evaluation. If not, the lowest score will be allocated.

4.3 Stage 2: Functionality Evaluation

Table 4: Functionality Evaluation Criteria

Evaluation Criteria	Weight	Scoring Criteria
1. Company Experience The bidder must have previously successfully supplied or installed or configured or maintained and supported similar projects in the past 5 years. The list and evidence must address the following: Description of the project, Client name, Client contact (i.e., email and office number), Project start date, project end date, and contract value. Furthermore, attach a completion certificate signed by the client or a letter from the client confirming the successful completion of the project. completion certificate or reference letters should be on referral client letterhead and signed. **NB: Letter/s that do not reflect all required items will be allocated the lowest score.**	20	**5- Excellent** 5 or more reference letters submitted reflecting all items. **4- Very Good** 4 reference letters submitted reflecting all items. **3 -Good** 3 reference letters submitted reflecting all the items. **2- Average** 2 reference letters submitted reflecting all items. **1-Poor** 0-1 reference letters submitted reflecting little detail.

2. Resource Experience (companies should indicate their level of skills to the product incl. an indication of their years of relevant experience relating thereto). **NB: If one of the two required qualifications (National Diploma/NQF6 or certifications) is submitted, the bidder will be allocated the lowest score**		
2.1. Project Manager Qualification A minimum of a National Diploma/NQF6 in ICT and related fields (IT, Computer Science, and Engineering discipline). Plus, equivalent Certified Project Management Certifications	10	5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Project Management certification 4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Project Management certification 3 = National Diploma/NQF6 plus Project Management certification 2= Matric plus Project Management certification 1= Matric without project management certification
2.2. Project Manager Experience Equivalent minimum of 5 years of experience, with at least five years of managing complex projects in a technical environment. Equivalent experience in Microsoft Project (MSP). Experience with full product lifecycle with understanding of development lifecycle and various technology methodologies that support that lifecycle. Extensive Project Management Skills (Minimum 5 years) Project/Program Planning skills; Financial	10	5 = More than 10 Years 4 = 6 to 10 Years 3 = 5 Years 2 = 3 to 4 Years 1 = 1 to 2 Years

Management Skills; Scope Management skills; Time management skills, Quality Management skills; Risk and Issue management skills; Project Budgeting skills; Integration Management skills; Human Resource Management skills; Communication skills; Report writing skills.		
2.3. Business/System Analyst Qualifications A minimum of a National Diploma/NQF6 in Information Technology/Computer Science or any related field. Plus, Business / System Analysis certifications would be essential.	10	5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Business / Systems Analysis specific certification 4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Business / Systems Analysis specific certification 3 = National Diploma/NQF6 plus Business / Systems Analysis specific certification 2= Matric plus Business / Systems Analysis specific certification 1= Matric without Business / Systems Analysis specific certification
2.4. Business/System Analyst Experience Equivalent minimum of 5 years' experience in Business System Analysis, business process management and business process engineering. Experience with SDLC, Agile and other	10	5 = More than 10 Years 4 = 6 to 10 Years 3 = 5 Years 2 = 3 to 4 Years

system development methodologies. Experience in ICT solutions delivery, business logic modelling, design and implementation. Experience working with multiple applications/ systems preferred. Software testing experience and knowledge of QA testing methodologies and the test lifecycle.		1 = 1 to 2 Years
2.5. Ivanti Senior System Engineer / Application Developer Qualification A minimum of a National Diploma/ NQF6 in Information Technology/Computer Science or any related field. Plus, Ivanti Classic, ITSM, and Ivanti 20.x Certification. ITIL V2 or V3 Foundation Certification.	10	5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification. 4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification 3 = National Diploma/NQF6 plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification 2= Matric plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification 1= Matric without Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification

2.6. Ivanti Senior System Engineer / Application Developer Experience Minimum of 5 years of experience in Ivanti Service Manager, ITSM, Ivanti Voice, IVANTI Discovery, DSM, and Ivanti 20.x. Experience with Migrating Ivanti Classic and ITSM Platforms to Ivanti 20.x. Software testing experience and knowledge and experience with a variety of different test strategies and approaches (Exploratory, Ad-hoc, Boundary, Functional, Non-functional, etc.). Experience working with defect management. Ability to clearly communicate software issues and behaviour to development, product management, and operations	10	5 = More than 10 Years 4 = 6 to 10 Years 3 = 5 Years 2 = 3 to 4 Years 1 = 1 to 2 Years
3. Proven Technical Competencies (aligned to the services to be rendered) • Submission of a detailed Project Approach and Methodology document: ○ Detailed Project plan with: ▪ Milestones ▪ Implementation Plan ▪ Deliverables; and ▪ Costing Schedule Etc. ○ Clear understanding of the context of the requirement ○ Clear strategy to the execution of the requirement	20	5 = Excellent (all three of the following has been submitted: proof of detailed proposed approach, methodology; and detailed proposed solution aligned to the services to be rendered with **value added services identified**) 4 = Very Good (all the following has been submitted: proof of proposed approach, methodology; and proposed solution aligned to the services to be rendered) 3 = Good (two of the following has been submitted: proof of proposed approach, methodology; or

• The methodology proposed needs to be innovative, including but not limited to the following— ○ Extensive and highly interactive stakeholder interactions ○ Showcase the value of the approach, ○ Align the proposal with the goals of the stakeholders ○ Share examples of where similar methodologies have been implemented and succeeded • Proposed solution		proposed solution aligned to the services to be rendered) 2 = Average (one of the following has been submitted: proof of proposed approach, methodology; or proposed solution aligned to the services to be rendered) 1 = Poor (No proof of proposed approach and methodology; proposed solution)
Total	**100**	
Minimum Threshold	**60**	
Bidders who did not meet a minimum threshold of 60% on Technical Evaluation Criteria will be disqualified for further evaluation on price and specific goals.		

NOTE:

- ***The bidders are expected to provide minimum of only one CV for the most experienced resource per role for evaluation.***
- ***In instances where a bidder submitted more than one CV per role, only one CV for the most experienced resource per role will be considered for evaluation.***

4.4 Stage 3: Preference Point System

In terms of Preferential Procurement Regulations, 2022, Regulation 4(1) the applicable Preference Point System for this tender is 80/20, Price (80), and Specific Goals (20). In terms of Regulation 4(2-4) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. The bidder must provide the relevant proof/ required documents for each preference point system indicated.

4.4.1 Pricing Evaluation

- The Service Provider must cost for the work to be done regarding license fees, system maintenance and support. For financial evaluation purposes, the service provider must provide a pricing schedule.
- The Financial Proposal must contain the financial proposal (SBD 3.3), which includes: cost for the work to be done regarding license fees, system maintenance and support, and the disbursement cost if applicable.
- The National Treasury reserves the right to negotiate rates submitted by bidders.

4.4.2 Specific Goals

For the purposes of this tender, the tenderer will be allocated points based on the goals stated and should be supported by proof/ documentation stated in Table 5 below.

Specific goals for the tender and points to be claimed are indicated in the table below:

The bidders who complied with the mandatory requirements and meet the minimum threshold of this bid were evaluated according to the Preference Point Scoring System as determined in the Preferential Procurement Regulations, 2022, pertaining to the Preferential Procurement Policy Framework Act, Act No 5 of 2000.

The following preference point system is applied to all the bids:

Table 5: Specific Goals

#	Specific goals	Score	Required proof/ documents to be submitted for evaluation purposes
1	**The company owned by people who are Youth.** • 100% company owned by Youth = 5 points • 75% - 99% company owned by Youth = 3 points • 60% - 74% company owned by Youth = 2 points • 51%- 59% company owned by Youth = 1 point	5 points	**Proof of claim as declared on SBD 6.1 (one or more of the following will be used verifying the tenderer's status:** • Company Registration Certification/ document (CIPC) • Company Shareholders certificate • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number)

	• 0 - 50% company owned by Youth = 0 point		• B-BBEE Certificate of the tendering company. • Consolidated B-BBEE certificated if the tendering companyisa Consortium, Joint Venture, or Trust (Issued by verification agency accredited by the South African Accreditation System). • Agreement for a Consortium, Joint Venture, or Trust.
2	**The company owned by Historically Disadvantaged Individuals (HDI) (Black).** • 100% company owned by HDI (black) = 5 points • 75% - 99% company owned by HDI (black) = 3 points • 60% - 74% company owned HDI (black) = 2 point • 51%- 59% company owned by HDI (black) = 1 point • 0 - 50% company owned by HDI (black) = 0 point	5 points	
3.	**The company owned by Women.** • 100% company owned by people who are women = 5 points • 75% - 99% company owned by people who are women = 3 points • 60% - 74% company owned by women = 2 point • 51%- 59% company owned by women = 1 point • 0 - 50% company owned by people who are women = 0 point	5 points	
4.	**The company owned by people who are disabled.**	5 points	

	• 100% company owned by people who are disabled = 5 points • 75% - 99% company owned by people who are disabled = 3 points • 60% - 74% company owned by people who are disabled = 2 point • 51%- 59% company owned by people who are disabled = 1 point • 0 - 50% company owned by people who are disabled = 0 point		

NB: Points will be allocated based on % ownership of the Company (Please attach proof/ required documents).

Failure to submit the required proof will lead to a zero (0) status level for non-compliant service providers. The points scored by a bidder in respect of the points indicated above will be added to the points scored for price. Only a bidder who has completed and signed the declaration part of the preference claim form will be considered. National Treasury may, before a bid is adjudicated or at any time, require a bidder to substantiate claims made regarding the required proof. A trust, consortium, or joint venture will qualify for points as a legal entity, provided that the entity submits the required proof.

4.4.3 Timeframe (Project Duration)

The successful bidder will be appointed for a period of three (3) years from the date of appointment.

4.4.4 Implemented Landscape

Support must be provided at various locations where NT is located which include but not limited to the following:

- SITA Centurion – John Vorster Drive, Centurion
- 40 Church Square – PTA CBD (Head Office)

- 120 Plein Street – CPT CBD (Small Footprint)
- Remotely online

5. TERMS AND CONDITIONS OF THE BID

- The successful service provider(s) and its employees or consultants will have to undergo a mandatory security clearance process. NT reserves the right to cancel, terminate or, not award the contract to a company that either doesn't avail itself for security clearance or fails such. The successful supplier will also enter into a non-disclosure agreement with the National Treasury.
- The CVs presented as part of the bid must be available for providing the service at National Treasury sites. If the resource is not available, NT reserves the right to accept or reject the replacement CVs presented. The service provider will be responsible for providing the desired replacement resources should the replacement CVs be rejected by NT.
- NT has the right to terminate the contract as and when the services are no longer required or as soon as the allocated funds are depleted.
- The service provider must undertake to conclude an agreement(s) which must consist of, but is not limited to the following:
    - A clear description of the required services and deliverables
    - Defined payment terms for the service.
    - Agreement that the successful service provider shall be a single point of contact for the service. In a case where the service provider outsourced services, the service provider will manage the National Treasury outsourced company directly.
    - Agreement that the successful service provider must provide qualified personnel who have undergone necessary training and certification to provide the required service. Should the skill/s not be available in-house, this must be specified.
- Successful bidder(s) must be able to commence work as soon as the agreement(s) have been signed.
- National Treasury reserves the right to screen and vet shortlisted service providers before the appointment.

- The National Treasury reserves the right to terminate the contract if there is clear evidence of deviations from the agreed specifications.

- National Treasury reserves the right to communicate with the service provider pertaining to information submitted on the closing date and time.

6. ANNEXURE A1: CURRICULUM VITAE TEMPLATES

Notes:

- The CV format provided must be strictly adhered to. Non-compliance will result in the CV being rejected.
- The CV shall not be longer than 4 x A4 s. A Minimum font size of 10 shall be used.
- The CVs must specifically and clearly address the service requirements for evaluation purposes.
- Only CV's may be submitted if the employee is employed or affiliated with the company submitting the CV. Proof of employment or affiliation with the company could be requested.
- CV's must be signed by the proposed resource.
- Resource may only be submitted by one company.

NOMINATED INDIVIDUAL'S CV

Nominated Individual's First Names	
Nominated Individual's Surname	
Nominated Individual's Date of Birth (yyyy-mm-dd, e.g. 2010-03-04)	
Nominated Individual's Nationality	
Nominated Individual's ID Number or Passport Number	
Service Provider's Name	
Resource allocation of Nominated Individual	

Education/Qualifications			
Institution	**From Date**	**To Date**	**Qualification Obtained** (Include the discipline e.g. BSc Computer Engineering)

Language Skills (Enter the languages below and indicate your competency: level, excellent, average, or basic.			
Language	**Reading**	**Speaking**	**Writing**
English			

Membership of Professional Bodies (Describe in full, do not use acronyms or abbreviations)

Professional Experience (work history in descending order of years)			
From Date	**To Date**	**Company/Organisation**	**Position**

Full Current Contact Details of Three References to be Provided				
Full Names	**Position**	**Company/ Organization**	**Telephone No.** (with country and	**Cell Phone No.** (With country code)

Declaration by the Nominated Individual Described in this CV. I declare that the above information is accurate and can be supported by documents and references on request. I declare that my CV is not included in the proposal of any other service provider.		
Name	**Signature**	**Date**

7. ANNEXURE A2: DETAILS OF SERVICE PROVIDER

7.1 SERVICE PROVIDER

Item	Detail	Description
Service Provider's Name		Name of the organisation or individual submitting
Central Supplier Database (CSD) Number		Reference number for the CSD system
Service Provider's Postal Address		Box number
		Suburb
		Postal code
Service Provider's Street Address		Number and street name
		Suburb
		Town/city
		Postal code
Service Provider's Telephone Number		Code and number, e.g., 012 488
Service Provider's Facsimile Number		Code and number, e.g., 012 488
Service Provider's		Company registration number if Applicable
Service Provider's VAT Registration		If applicable
Service Provider's SARS Tax Number		

Service Provider's Tax Clearance Certificate Expiry Date		yyyy-mm-dd, e.g., 2010-03-04
Contact Person		Contact person for this bid
Contact Person's Cell Phone Number		Number, e.g., 088 345 6789
Contact Person's Email Address		
Name of Person Signing this Bid		Full name
Date of Signature of the Bid		yyyy-mm-dd, e.g., 2010-03-04
Capacity Under which this Bid is Signed		Director, member, individual, etc.
Signature		Sign here

Notes:

- If the postal address is the same as the street address, leave the postal address fields blank.
- When completed, print a copy and sign. Submit the signed copy as part of the bid.
- This form must be completed irrespective of whether the service provider is an individual or an organisation.

8. ANNEXURE A3: SERVICE PROVIDER PROFILE

8.1 SERVICE PROVIDER

Summary of Service Provider's Relevant Experience (maximum 10 one sentence bullet points)
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☐
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☐
☐
☐
☐
☐
☐
☐

Summary of Service Provider's Areas of Expertise (maximum 10 one sentence bullet points)
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☐
☐
☐
☐
☐

Service Provider Name	
Representative's Name	

Representative's Signature	
Date of Signature	

Notes:

When completed, print a copy and sign. Submit the signed copy as part of the bid.

9. ANNEXURE A4: LIST OF SIMILAR PROJECTS AND CLIENTS CONTACT TEMPLATE

Project Description	Scope of Work	Breakdown of the resources and roles	Duration (Start date -end date)	Client Contact Details