

**TERMS OF REFERENCE**

**APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE SUPPORT, MAINTENANCE AND TRAINING SERVICES ON SAGE EVOLUTION FOR A PERIOD OF THIRTY - SIX (36) MONTHS.**

**Programme Identification**

Name of Client	Government Technical Advisory Centre (GTAC)
Name of Project	Support, maintenance and training on Pastel Evolution
Contracting Authority	Government Technical Advisory Centre (GTAC)
Accountable Officer	Ronette Engela: Accounting Officer, GTAC
Budget Manager	Markus Rautenbach: Chief Director – Financial Management
Project Purpose	GTAC seeks to appoint a service provider for Pastel Evolution support services over three years.

Markus Rautenbach  
 CD: Financial Management  
 Signature:   
 Date: 24/02/2026

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 DD: Professional Services Procurement  
 Signature:   
 Date: 25/02/2026

Contents

- 1. **BACKGROUND INFORMATION** ..... 3
- 2. **PURPOSE**..... 3
- 3. **TECHNICAL EXPERTISE REQUIRED**..... 3
- 4. **SCOPE OF SERVICE TO BE RENDERED** ..... 4
  - 4.1 Support, Maintenance and related services on Sage Evolution software..... 4
  - 4.2 Sub-Contracting..... 4
  - 4.3 Time Frame..... 4
- 5. **EVALUATION CRITERIA**..... 4
  - 5.1 Evaluation Phases/Methodology..... 5
    - 5.1.1 **Stage 1a: Administrative Compliance (Non-Disqualification)**.....5
  - 5.2 Tax Clearance Status.....7
    - 5.2.1 **Stage 1b: Mandatory Compliance (Disqualification)**.....7
    - 5.2.2 **Phase 2: Desktop Evaluation**..... 8
    - 5.2.3 **Phase 3: Price and Specific Goals Evaluation**..... 8
- 6. **CONDITION OF CONTRACT** ..... 10
  - 6.1 Provision of services shall be governed by the General Conditions of Contract as well as a Service Level Agreement (SLA) to be entered into between GTAC and the successful service provider.....10
  
- 7. **PROPOSED SERVICE LEVEL AGREEMENT (SLA) RESPONSE TIMES**..... 11
- 8. **CONTRACTING AUTHORITY**..... 11
- 9. **OTHER BID CONDITIONS**.....11
- 10. **BID VALIDITY PERIOD**..... 11
- 11. **LEGAL IMPLICATIONS**.....12
- 12. **CLARIFICATIONS**..... 12
- 13. **COMMUNICATION**..... 12
- 14. **COUNTER CONDITIONS**.....12
- 15. **PROHIBITION OF RESTRICTIVE PRACTICES**..... 12
- 16. **BENEFICIAL OWNERSHIP**..... 13
- 17. **SUBMISSION DETAILS**..... 13
- CONTACT DETAILS**.....14

## **1. BACKGROUND INFORMATION**

GTAC is a government entity promulgated through a Legal Notice (35194) published in the Government Gazette on 30 March 2012. It is an agency of the National Treasury, established to assist Organs of State in building their capacity for efficient, effective and transparent financial management.

The functions of GTAC are:

- To render technical consulting services to the Centre of Government Departments and Organs of State;
- To provide specialised procurement support for high–impact government initiatives;
- To render advice on the feasibility of infrastructure projects;
- To provide knowledge management for projects undertaken; and

GTAC's Founding Notice indicates that it provides services to its clients through agreements with the National Treasury, centre–of–government departments and organs of state. GTAC implements its mandate through a client–focused and predominantly project–based approach and collaborates with partners inside and outside government in the development and delivery of its services.

More information on the organisation and its work may be found on the GTAC website ([www.gtac.gov.za](http://www.gtac.gov.za)).

## **2. PURPOSE**

The purpose of these Terms of Reference is to appoint a service provider to provide support, maintenance and training on Pastel Evolution to meet the full accounting functions for GTAC.

## **3. TECHNICAL EXPERTISE REQUIRED**

Since the establishment of GTAC in 2013/14 there has been a lot of development and expansion on the GTAC business and operations resulting in increased accounting transactions and record keeping. An accredited Pastel support service provider is required to provide Sage Evolution maintenance, support and training

services.

#### **4. SCOPE OF SERVICES TO BE RENDERED**

##### **4.1 Support, Maintenance and related services on Sage Evolution software:**

- 4.1.1 Provision of Sage support and maintenance services to GTAC, e.g. Onsite, remote, email and telephonic support on the Sage software;
- 4.1.2 Incident tracking;
- 4.1.3 Monthly reporting on incident tracking (Number of support calls logged per month per category, response times for all support incidents logged, details on resolved and unresolved support calls/incidents).
- 4.1.4 Periodic software upgrades and updates as these become available;
- 4.1.5 Facilitation/Go-between (3rd party hardware and software);
- 4.1.6 Resolution of technical issues and application errors;
- 4.1.7 Preventative maintenance and disaster recovery;
- 4.1.8 Monthly data back-up;
- 4.1.9 Training as and when required;
- 4.1.10 Provide valid proof of accreditation Sole Provider (SAGE) documents/ evidence to provide this service; and
- 4.1.11 Facilitate the PASTEL annual license renewal.

##### **4.2 Sub-Contracting**

The work that the service provider will be contracted to do shall not be subcontracted.

##### **4.3 Time Frame**

The appointment period will be from 1 April 2026 up to 31 March 2029.

#### **5. EVALUATION CRITERIA**

GTAC has set minimum standards that bidders must meet to be selected as successful bidders.

The successful bidder will be awarded the contract for the **above** duration of the service requirements and will be selected based on the following three-phase process:

## 5.1 Evaluation Phases/Methodology

**Table 1: Evaluation Phases**

Evaluation Stage	Description
Phase 1	<p>Stage 1A: Administrative Compliance – Non-Disqualifying A bidder is required to submit the administrative compliance documents as referred to in paragraph 5.1.1.</p> <p>Stage 1B: Mandatory Compliance – Disqualification/ Pre-Qualification Failure to submit any of the required mandatory documents will lead to disqualification. Refer to paragraph 5.2.1</p>
Phase 2	<p>Evaluation Criteria: (Comply/Not Comply) Bidders must submit information as per the Bid Submission Requirements and will be evaluated on compliance according to ToR. Only bidders that fully meet the compliance criteria will be considered responsive and will be evaluated on Price and Specific Goals.</p>
Phase 3	<p>Price and Specific Goals Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 8. Bidders must provide the required information for evaluation purposes.</p>

It should be noted that the stages are considered to be separate processes. These three phases are mutually exclusive and will be treated as such in the appraisal.

### **5.1.1 Stage 1a: Administrative Compliance (Non-Disqualification)**

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of the bid. Bidders must submit all returnable documents as outlined in the table below using the designated electronic e-procurement system

**Table 2: Bid requirements compilation and submission:**

Document to be submitted	Requirement
SBD 1- Invitation to Bid	Complete the supplied pro forma document on the e-procurement system.

SBD 4 - Bidder's Disclosure (Refer to note below)	Complete the supplied pro forma document on the e-procurement system.
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**Note:**

Bidders must complete the SBD 4 document as provided on e-procurement. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form:

- "Person" means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier.

- "State" means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament.

Document to be submitted	Requirement
SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022.	<p>Complete the supplied pro forma document on e- procurement system i.e SBD 6.1 and Specific Goals tab as provided on the e-procurement system.</p> <p>Failure to complete the SBD 6.1 will result in the bidder forfeiting points for specific goals.</p>

## 5.2 Tax Clearance Status

A valid tax PIN / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Bidder's tax matters must be compliant at the time of award. In the case where a bidder's tax matters are non-compliant, a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

No award shall be made to a bidder whose tax affairs are not in order.

GTAC reserves the right to withdraw an award or cancel a contract concluded with a successful bidder if it is established that such bidder was not tax compliant at the time of the award.

GTAC further reserves the right to cancel a contract with a successful bidder if such bidder does not remain tax compliant for the full term of the contract.

### 5.2.1 Stage 1b: Mandatory Compliance (Disqualification)

Bidders must submit a responsive proposal in accordance with these terms of reference and below the minimum prequalification. **Failure to adhere to any of these requirements will result in disqualification:**

- a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Quotation (RFQ).
- b. Bidder to provide a valid proof of affiliation/ accreditation with SAGE to provide this service.
- c. Submission of a price/financial proposal is required as per SBD 3.3, and must be completed as indicated in the e-procurement portal. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed

by the state will not be considered. i.e., if a bidder representative is in the employment of the state, such a bid proposal will not be considered.

### 5.2.2 Phase 2: Desktop Evaluation

- a. Bids will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this ToR.
- b. In a case where there is a difference between the contents of this ToR and the e-procurement system, the ToR takes precedence.

**Table 4: Compliance / Desktop Evaluation Criteria**

No.	Evaluation Criteria	Submission Requirement
1	<p>Company experience</p> <ul style="list-style-type: none"> <li>• SAGE support, maintenance and related/similar services.</li> </ul>	<p>5 = &gt; 10 years of combined experience in SAGE support, maintenance and related services.</p> <p>Company experience with more than five (5) years' in rendering the same or similar service.</p>
2	<p><i>Client Experience (references)</i>  <i>Number of years of experience in SAGE support, maintenance and related services.</i></p> <p><i>The client should list the references of experience as indicated in the template.</i></p>	<p>Three (3) reference letters/testimonials from clients to which the same or similar services have been rendered in the past five (5) years. Letters must indicate:</p> <ol style="list-style-type: none"> <li>a. Description of services provided.</li> <li>b. Timeline of when services were provided (dates/contract duration).</li> <li>c. Company name and name and contact number of relevant individual.</li> </ol> <p>(If testimonial/reference letter does not include contact details of reference a separate schedule must be provided including contact number/s and email address).</p>

**Only bidders that fully meet the criteria as stated in table 4: Evaluation criteria above will be considered for the Price and Specific Goals evaluation in terms of the Preferential Procurement Regulation (PPR) 2022.**

### 5.2.3 Phase 3: Price and Specific Goals Evaluation

- a. The Preferential Procurement Evaluation will be based on the 80/20 principle.

- b. The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. which must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in Table 5 below.
- c. Submission of a price proposal is required in the proforma format. (SBD 3.3). Bidders need to provide the price in line with the Scope of Work as highlighted in paragraph 4 of the ToR, inclusive of VAT. The bidder to take note of the allowable CPI adjustment of 6%.
- d. The maximum number is for 12 users in Finance not the whole GTAC organisation;
- e. The incidents are as and when required; and the PASTEL license will be paid directly to SAGE (Do not quote for their annual fees).
- f. The estimated time requirement during this period is calculated at 650 hours (or 81 days).
- g. GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).

**Table 5: Price and Specific Goals Evaluation Criteria**

<b>Number of points allocated (80/20 system)</b>	
<b>Price</b>	<b>80</b>
<b>The specific goals allocated points in terms of this tender</b>	<b>20</b>
Above 30% ownership for Historically Disadvantaged individual who had no franchise in national elections before the 1983 or 1993 Constitutions.	5
Women percentage of ownership: 30% and above	5
Disability percentage of ownership: 30% and above	5
Youth percentage of ownership: 30% and above	5
<b>Total Points</b>	<b>100</b>

**The CSD report shall be used as evidence to confirm/award points for specific goals. It is the responsibility of the bidding entity to ensure that the information on the CSD is updated.**

**Table 6: Definitions**

Terminology	Definition
“Specific Goals”	means specific goals as contemplated in section 2(1)(d) of the Act, which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability, including the implementation of programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994;
Historically Disadvantaged Individual (HDI)	means a South African citizen: <ol style="list-style-type: none"><li>1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution); and/or</li><li>2. who is a female; and/or</li><li>3. who has a disability.</li></ol> provided that a person who obtained South African citizenship on or after the coming into effect of the Interim Constitution is deemed not to be an HDI;

## **6. CONDITIONS OF CONTRACT**

6.1 Provision of services shall be governed by the General Conditions of Contract as well as a Service Level Agreement (SLA) to be entered into between GTAC and the successful service provider. The SLA shall include the following minimum conditions:

- 6.1.1 The contract duration shall be for a minimum period of thirty- six (36) months. Renewal of the contract shall be made through the conclusion of an addendum to the SLA.
- 6.1.2 Support and maintenance services shall be managed through the SLA response times attached hereto as Annexure A.
- 6.1.3 GTAC shall be responsible for all required software licenses for software products.
- 6.1.4 Appointment shall be subject to positive security screening results by the State Security Agency (SSA).
- 6.1.5 The successful service provider shall be required to remain tax compliant for the

contract duration.

## 7. PROPOSED SERVICE LEVEL AGREEMENT (SLA) RESPONSE TIMES:

A. Definitions	
•	Normal operating hours (Mon – Fri) – 8am – 5pm.
•	Weekend/holiday rates – Rate charged for any work done during hours not falling within normal operating hours defined above
B. # Incident Type    Required Response Times	
1	Critical – Incidents defined as critical involve errors/issues where system users cannot continue working and are also catered for and are applicable at critical times such as month end and financial year end.    Same day (1 – 4 hours from time incident is logged).
	Urgent – Incidents defined as urgent are not as critical as in 1 above and can be resolved within 4 – 8 hours.    Same day (4 – 8 hours from time incident is logged).
3	Normal – Incidents causing minimal business disruption.    Resolution within 1 – 2 days.
4	Appointment – non-critical incidents whereby resolution can be scheduled and arranged at a mutually agreed time or by appointment.    By                      scheduled appointment (within 2 -3 days).

## 8. CONTRACTING AUTHORITY

The Contracting Authority will be the Government Technical Advisory Centre (GTAC).

## 9. OTHER BID CONDITIONS

Prior to the appointment, the recommended service provider may be required to submit additional supporting documentation.

GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

## 10. BID VALIDITY PERIOD

The RFQ will be valid for a period of sixty (60) days from the closing date of the RFQ.

## **11. LEGAL IMPLICATIONS**

The successful service provider must be prepared to enter into a service-level agreement with GTAC.

## **12. CLARIFICATIONS**

Requests for clarification must be made in writing by e-mail. Telephonic enquiries for clarification will not be accepted.

Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.

## **13. COMMUNICATION**

GTAC's Professional Services Procurement (PSP) unit will only communicate with bidders by email where bid clarity is sought, to obtain information or to extend the validity period. For any enquiries, email: [psp@gtac.go.za](mailto:psp@gtac.go.za). The submission reference must be included in the subject line of the email. GTAC will only respond to email communication during business hours.

Alternatively, contact the e-procurement portal support desk at:  
<https://vendorportal.gtac.gov.za/Contact>.

Any communication by the bidder (either by facsimile, letter, electronic mail or any other form of correspondence) to any government official, representative, or a person acting in an advisory capacity for GTAC in respect of this bid between the closing date and the award of the bid is prohibited.

## **14. COUNTER CONDITIONS**

Bidders' attention is drawn to the fact that amendments to any of the Information to bid by bidders will result in invalidation of such bids.

## **15. PROHIBITION OF RESTRICTIVE PRACTICES**

In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:

- a. Directly or indirectly fixing a purchase or selling price or any other trading condition.
- b. Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
- c. Collusive bidding.
- d. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

## **16. BENEFICIAL OWNERSHIP**

The bidder/s are required to provide the information below for transparency.

- a. A beneficial owner of a company is an individual who, directly or indirectly, ultimately owns that company or exercises effective control over that company.
- b. Companies are required to keep a register of their beneficial owners and to provide this information to the Companies and Intellectual Property Commission (CIPC). The CIPC maintains a central register of beneficial ownership information.
- c. The beneficial ownership regime in South Africa is intended to improve transparency and accountability in the corporate sector. It is also intended to help prevent money laundering and terrorist financing.
- d. Companies are required to keep a register of their beneficial owners and must disclose in their bids the following information, as provided in their register for the information of each beneficial owner:
  - Name
  - Date of birth
  - Identity number or passport number
  - Residential address
  - Occupation
  - Nature and extent of control over the company

## **17. SUBMISSION DETAILS**

To respond to this tender, bidders are required to register on the GTAC e-procurement system, using the following link: <https://vendorportal.gtac.gov.za/>

The registration process involves the following steps:

- a) Register as a portal user. This is the process of creating a user account on the vendor portal/e-procurement system. This will allow the user to view and respond to tenders.
- b) Capture the supplier details. Registering the company details allows the bidder to enter information and upload documents.

To respond to this tender:

- c) Log in to the portal <https://vendorportal.gtac.gov.za/>
- d) Navigate to the tender menu.
- e) Select “Formal” and click on “Current”.
- f) A list of available tenders/RFQ will be available, and the bidder to select the tender number (e.g. TENxxxxx) to start the submission process.

Detailed instructions on how to register on the e-procurement system are available at

(<https://docs.corelab.co.za/Home/ViewContent?productid=1&sectionid=2&contentid=1165>)

The capturing process is in the form of a wizard, with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for the award.

**NB: Only electronic submission of bids on the GTAC e-procurement system is allowed. Do not submit hard copy bids to GTAC, as these will not be considered.**

**NB: Submissions received after the closing date and time will not be accepted.**

For any enquiries, email: [psp@gtac.gov.za](mailto:psp@gtac.gov.za) or contact the vendor support desk at: <https://vendorportal.gtac.gov.za/Contact>.

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