



INFORMATION AND COMMUNICATION TECHNOLOGY

TERMS OF REFERENCE (TOR)

NT002-2026

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

CLOSING DATE: 09 FEBRUARY 2026 AT 11:00 AM

VALIDITY PERIOD: 90 DAYS

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LIST OF ABBREVIATIONS

CIPC	Companies and Intellectual Property Commission
CSD	Central Supplier Database
NT	National Treasury
SARS	South African Revenue Service
SCC	Special Conditions of Contract
SBD	Standard Bidding Document
VAT	Value Added Tax

Table 1: Bid Document Checklist and Returnable Documents

#	Document Name ¹	Included in the published bid document?	To be returned by bidder?	Bidder to tick Yes if document is submitted
PHASE 1: MANDATORY REQUIREMENTS				
	Valid proof of being an IVANTI Accredited partner/reseller	No	Yes	
	Pricing Schedule (SBD 3.3)	Yes	Yes	
PHASE 2: LEGISLATIVE AND STANDARD BIDDING REQUIREMENTS FOR FUNCTIONALITY PURPOSE				
	SBD 1 invitation form to bid	Yes	Yes	
	SBD 4 Declaration of Interest	Yes	Yes	
	SBD 6.1 Preference Points Claim Form	Yes	Yes	
	CIPC documents	No	Yes	
	Valid Tax Clearance Certificate	No	Yes	
Phase 2.1 ADDITIONAL REQUIREMENTS (NOT FOR DISQUALIFICATION)				
	Brief Narrative Profile (Annexure A2)	No	Yes	
	COIDA Valid Letter of Good Standing	No	Yes	
	Full CSD report	No	Yes	
	Valid work permit and security clearance (If	No	Yes	

#	Document Name ¹	Included in the published bid document?	To be returned by bidder?	Bidder to tick Yes if document is submitted
	Applicable)			
	South African Qualifications Authority (SAQA) certificate for foreign qualifications	No	Yes	
PHASE 3: FUNCTIONALITY				
	Reference Letters supported by purchase orders/Completion Certificate/ SLA	No	Yes	
	Project Manager Qualification	No	Yes	
	Project Manager CV	No	Yes	
	Business/System Analyst Qualifications	No	Yes	
	Business/System Analyst CV	No	Yes	
	Ivanti Senior System Engineer / Application Developer Qualifications	No	Yes	
	Ivanti Senior System Engineer / Application Developer CV	No	Yes	
	Project plan	No	Yes	
PHASE 4: PRICE & SPECIFIC GOALS				
	Proof of specific goals requirements	No	Yes	

1. INTRODUCTION

These Terms of Reference (TOR) provide the specifications for the provision of appointing a service provider to upgrade of IVANTI 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.

Briefing Session

A non-compulsory briefing session will be conducted using Microsoft Teams. To express your interest in joining the session, please send an email to NTAdministrativeTenders@treasury.gov.za The meeting details are as follows

Date: 26 January 2026

Time: 11:00-12:00 AM South African Standard Time (SAST)

Venue: MS Teams

Link : [NT002-2026: 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 BRIEF... | Meeting-Join | Microsoft Teams](#)

2. PURPOSE

The purpose of this document is to provide Terms of Reference to service providers willing to bid for the upgrade of IVANTI 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.

3. 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.

3.1 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

3.2 Solution Requirements

3.2.1 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.

3.2.2 Licensing Requirements

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

Table 2: 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

3.2.3 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 the required documentation 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 on-site 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.

3.3 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 who will analyse, document, and test system requirements for new deployments and a developer/Ivanti engineer for software development, 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:
<ul style="list-style-type: none"> • Minimum of National Diploma NQF6 in ICT and related fields (IT, Computer Science, and Engineering disciplines) • Project Management Certifications
Experience/ skills required:
<ul style="list-style-type: none"> • Minimum of 5 years of experience in managing complex projects in a technical environment. • 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
<p>Job Title: Business / System Analyst</p> <p>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.</p> <p>Qualifications:</p> <ul style="list-style-type: none"> • Minimum of National Diploma/NQF6 in Information Technology/Computer Science or any related field • Business and System Analysis certification. <p>Experience/ skills required:</p> <ul style="list-style-type: none"> • 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
<p>Job Title: Ivanti Senior System Engineer / Application Developer</p>

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:

- Ivanti Classic, ITSM, and Ivanti 20.x Certification

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

3.4 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 the 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.

4. SUBMISSION REQUIREMENTS

4.1 Resources Requirements

- The bidder must provide the skills required by the NT.
- Only CVs 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.
- Submitted CVs for individual consultants must indicate that they have specific experience in the provision of the required competencies, and service providers 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.

4.2 Bid Submission

- Service providers must respond to the TOR and demonstrate alignment between the proposed solution and the requirement.

4.3 Security Requirements

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

5. SUMMARY OF EVALUATION CRITERIA

5.1 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

5.2 Stage 1: Mandatory Requirements Evaluation

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

- a) Bidder must provide valid proof of being an IVANTI Accredited partner/reseller.
- b) Bidder must submit a detailed price 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.

5.2.1 Additional Requirements (Not for elimination)

- a) The format of the CVs must be in accordance with the prescribed format (**ANNEXURE A1**),
- b) 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.
- c) CVs submitted for the resources **must indicate the position that they will be evaluated for**, e.g., Project Manager or Engineer/Technical resources.
- d) Proof of valid registration with Compensation for Occupational Injuries and Disaster (COIDA).
- e) Valid work permit and existing security clearance for foreign nationals are compulsory.
- f) Proof of the Central Supplier Database (CSD) report, full report.
- g) Bidders are required to submit proof of educational qualification(s) for all resources required.
- h) All foreign qualifications must be accompanied by a South African Qualifications Authority (SAQA) certificate of evaluation.

NOTE:

- ***The National Treasury may contact bidders in case additional information is required.***
- ***Failure to comply with the requirement within 7 working days after being informed will lead to invalidation of your bid***

5.3 Stage 2: Functionality Evaluation

Table 4: Functionality Evaluation Criteria

Evaluation Criteria	Weight	Scoring Criteria
1. Proven Track Record Bidders are required to submit a minimum of three (3) reference letters indicating that they have successfully supplied/installed/configured or maintained and supported similar projects in the recent 10years.The reference letters must be signed and be on the letterhead of the institution/organization where the supply/installation/configuration/maintenance and support were provided.	15	5- Excellent 5 reference letters submitted aligned to the service offering 4- Very Good 4 reference letters submitted aligned to the service offering 3 -Good 3 reference letters submitted aligned to the service offering 2- Average 2 reference letters submitted aligned to the service offering 1-Poor 0-1 reference letters submitted aligned to the service offering
2. Resource Experience		
2.1. Project Manager Qualification A minimum of a National Diploma/NQF6 in ICT and related fields (IT, Computer	10	5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Project Management certification

Science, and Engineering discipline). Plus, equivalent Certified Project Management Certifications		<p>4= Bachelor's Degree/ Advanced Diploma (NQF 7) plus Project Management certification</p> <p>3 = National Diploma/NQF6 plus Project Management certification.</p> <p>2=Matric plus Project Management certification.</p> <p>1= Matric without project management certification.</p>
<p>2.2. Project Manager Experience</p> <p>A 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 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.</p>	15	<p>5 = 8 years or more</p> <p>4 = 6 to 7 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>

<p>2.3. Business/System Analyst Qualifications</p> <p>A minimum of a National Diploma/NQF6 in Information Technology/Computer Science or any related field. Plus, Business/Systems Analysis certification.</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Business / Systems Analysis specific certification</p> <p>4= Bachelor's Degree/ Advanced Diploma (NQF 7) plus Business / Systems Analysis specific certification</p> <p>3 = National Diploma/NQF6 plus Business / Systems Analysis specific certification</p> <p>2= Matric plus Business / Systems Analysis specific certification</p> <p>1= Matric without Business / Systems Analysis specific certification</p>
<p>2.4. Business/System Analyst Experience</p> <p>A minimum of 5 years' experience in Business/Systems Analysis.</p>	<p>15</p>	<p>5 = More than 8 Years</p> <p>4 = 6 to 7 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>
<p>2.5. Ivanti Senior System Engineer / Application Developer Qualification</p> <p>A minimum of a National Diploma/ NQF6 in Information Technology/Computer</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Ivanti Certification.</p>

Science or any related field. Plus, Ivanti Certification.		<p>4= Bachelor's Degree/ Advanced Diploma (NQF 7) plus Ivanti Certification</p> <p>3 = National Diploma/NQF6 plus Ivanti Certification</p> <p>2= Matric plus Ivanti Certification</p> <p>1= Matric without Ivanti Certification</p>
<p>2.6. Ivanti Senior System Engineer / Application Developer Experience</p> <p>A 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</p>	15	<p>5 = More than 8 Years</p> <p>4 = 6 to 7 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>
3. Proven Technical Competencies (aligned to the services to be rendered)	10	<p>5 = Excellent (all the following has been submitted: proof of proposed approach, methodology; proposed solution aligned to the services to be rendered and additional</p>

<ul style="list-style-type: none"> • Submission of a detailed Project Approach and Methodology document: <ul style="list-style-type: none"> ○ Detailed Project plan with: <ul style="list-style-type: none"> ▪ Milestones ▪ Implementation Plan ▪ Deliverables; and ▪ Costing Schedule Etc. ○ Clear understanding of the context of the requirement ○ Clear strategy to the execution of the requirement • The methodology proposed needs to be innovative, including but not limited to the following— <ul style="list-style-type: none"> ○ 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 		<p>information over and above what is requested).</p> <p>4 = Very Good (all the following has been submitted: proof of proposed approach, methodology; and proposed solution aligned to the services to be rendered)</p> <p>3 = Good (two of the following has been submitted: proof of proposed approach, methodology; or proposed solution aligned to the services to be rendered)</p> <p>2 = Average (one of the following has been submitted: proof of proposed approach, methodology; or proposed solution aligned to the services to be rendered)</p> <p>1 = Poor (No proof of proposed approach and methodology; proposed solution)</p>
Total	100	
Minimum Threshold	60	
<p>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.</p>		

5.4 Stage 3: Preference Point System

In terms of Preferential Procurement Regulations, 2022, Regulation 4(1) 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.

5.4.1 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.

5.4.2 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.	5 points	Proof of claim as declared on SBD 6.1 (one or more of the following will

	<ul style="list-style-type: none"> • 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 points • 0 - 50% company owned by youth = 0 points 		<p>be used verifying the tenderer's status:</p> <ul style="list-style-type: none"> • Company Registration Certification/document (CIPC) • Company Shareholders certificate • Certified identification documentation of company director/s • B-BBEE Certificate of the tendering company. • Consolidated B-BBEE certificated if the tendering company is a 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.	<p>The company is owned by Black people.</p> <ul style="list-style-type: none"> • 100% company owned by black people = 5 points • 75% - 99% company owned by black people = 3 points • 60% - 74% company owned by black people = 2 points • 51%- 59% company owned by black people = 1 points • 0 - 50% company owned by black people = 0 points 	5 points	
3.	<p>The company owned by Women.</p> <ul style="list-style-type: none"> • 100% company owned by people who are women = 5 points 	5 points	

	<ul style="list-style-type: none"> • 75% - 99% company owned by people who are women = 3 points • 60% - 74% company owned by people who are women = 2 points • 51%- 59% company owned by people who are women = 1 points • 0 - 50% company owned by people who are women = 0 points 		
4.	<p>The company owned by people who are disabled.</p> <ul style="list-style-type: none"> • 100% company owned by disabled people = 5 points • 75% - 99% company owned by disabled people = 3 points • 60% - 74% company owned by disabled people = 2 points • 51%- 59% company owned by disabled people = 1 points • 0 - 50% company owned by disabled people = 0 points 	5 points	

***Note:**

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.

5.4.3 Timeframe (Project Duration)

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

5.4.4 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
- Riverwalk Office Park – Ashlea Gardens

5.3. Conduct any evaluation verifications prior to final award or at any time during the contract term period.

6. TERMS AND CONDITIONS OF THE BID

- The National Treasury reserves the right to conduct due diligence during the evaluation process to determine the ability of the bidder to honour contractual obligations that might emanate from this tendering process. The due diligence is not only limited to the bidder but to all parties the bidder might have confirmed to do business with for the fulfilment of the contract that might be awarded.
- To conduct due diligence prior to final award or at any time during the contract period and this may include pre-announced/ non-announced site visits. During the due diligence process the

information submitted by the bidder will be verified and any misrepresentation thereof may disqualify the bid in whole or parts thereof.

- To conduct any evaluation verifications prior to final award or at any time during the contract term period
- The National Treasury reserves the right to verify the reference letters submitted by the bidders
- The National Treasury reserves the right to appoint more than one service provider
- 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 resource 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.
- In case the resource contracted/presented as part of the bid is no longer available, the replacement should be equivalent or higher in terms of experience and qualifications. The replacement should be within seven (7) days.
- NT has the right to terminate the contract as and when the services are no longer required. or the allocated funds are depleted, any irregularity and or breach of contract.
- 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.
- National Treasury reserves the right to communicate with the service provider pertaining to information submitted on the closing date and time.
- The successful bidder will be required to enter into 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.
- **CONTACT DETAILS**

Email : NTAdministrativeTenders@treasury.gov.za

ANNEXURE A1: CURRICULUM VITAE TEMPLATES

Notes:

- The CV format provided must be strictly adhered to.
- 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 CVs may be submitted if the employee is employed or affiliated with the company submitting the CV.
- CVs must be signed by the proposed resource.
- Resource may only be submitted by one company.
- CV template is a prerequisite and the actual CV information may be supplement to the completed and provided CV template.

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	
Role 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/ Organizati on	Telephone No. (with country and	Cell Phone No. (With country code)

<p>Declaration by the Nominated Individual Described in this CV.</p> <p>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.</p>		
Name	Signature	Date

Approved by the Service Providers Submitting the Bid		
Service Provider's Name		
Service Provider's Representative's		
Name	Signature	Date

Notes:

When completed, print a copy, and sign every page. Note each page must be signed by the nominated individual whose details are given, and a representative of the service provider submitting the bid. Submit the signed copy as part of the bid.

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)
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Summary of Service Provider's Areas of Expertise (maximum 10 one sentence bullet points)
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Locations of Service Provider's Offices in SA (names of towns only)

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

NT002-2026: APPOINTMENT OF A SERVICE PROVIDER TO 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

