



International Trade Administration Commission of South Africa

TERMS OF REFERENCE FOR THE DEVELOPMENT, IMPLEMENTATION, MAINTENANCE AND SUPPORT OF AN ENTERPRISE SOFTWARE SOLUTION FOR AN INTEGRATED SINGLE PERMIT GENERATION AND SUBMISSION PLATFORM FOR ITAC FOR A PERIOD OF 60 MONTHS

RFP NUMBER: ITAC 05-2023/2024

Date Issued: 17 November 2023

Closing date and time: 08 December 2023

Bid Validity period: 120 days

TENDER BOX ADDRESS:

The **dtic** Campus
Ground Floor, Block E
77 Meintjies Street
Sunnyside
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0002

TABLE OF CONTENTS

1. PURPOSE.....3

2. BACKGROUND.....3

 2.1 ESTABLISHMENT OF THE INTERNATIONAL TRADE ADMINISTRATION COMMISSION (ITAC) .3

 2.2 ITAC’S KEY STRATEGIC OBJECTIVES3

 2.3 FUNCTIONAL AREAS OF ITAC.....4

3. PROJECT OBJECTIVE5

4. PROJECT REQUIREMENTS AND DELIVERABLES5

 4.1 PROJECT REQUIREMENTS.....5

 4.2 PROJECT DELIVERABLES6

5. EXPERTISE REQUIRED7

6. TIME FRAMES AND DURATION OF APPOINTMENT7

7. REMUNERATION CONDITION8

8. CONTRACTING PROCESS.....8

9. SPECIAL PROVISIONS OF CONTRACT8

10. GENERAL CONDITIONS OF CONTRACT9

11. BIDDING DOCUMENTS TO BE COMPLETED, SIGNED AND SUBMITTED.....9

12. LEGISLATIVE FRAMEWORK OF THE BID9

13. CONTRACT DOCUMENTS10

14 EVALUATION OF PROPOSAL RECEIVED10

15 CLOSING DATE AND TIME10

16. PROPOSAL SUBMISSION / RESPONSES.....17

17. NON-COMPULSORY BRIEFING SESSION (HYBRID)17

18. ENQUIRIES18

19. ANNEXURES.....18

 ANNEXURE A: GENERAL CONDITIONS OF CONTRACT18

 ANNEXURE B: STANDARD BIDDING DOCUMENTS18

 ANNEXURE C ADDENDUM(EVALUATION CRITERIA)19

1. Purpose

The purpose of this Request for Proposal (RFP) is to solicit proposals from suitably qualified and experienced service providers for the development, implementation, maintenance and support of an enterprise software solution for an integrated single permit generation and submission platform for ITAC.

This RFP does not constitute an offer to do business with ITAC, but merely serves as an invitation to bidder(s) to facilitate a requirements-based decision process.

2. Background

2.1 Establishment of the International Trade Administration Commission (ITAC)

The International Trade Administration Commission (ITAC) was established in terms of Section 7 of International Trade Administration Act, 2002 (Act No. 71 of 2002).

ITAC was established with its own offices located in Tshwane, Sunnyside at *the dtic* campus in 2003. The current organisational structure provides for the employment of the 131 employees. The said structure consists of Senior Management Service (SMS); Middle Management Service (MMS) and other employees.

2.2 ITAC's Key Strategic Objectives

To achieve its aims, ITAC has identified the following three key strategic objectives to guide its operations, namely to:

- 2.2.1 Ensure appropriate contribution to economic growth and development through provision of its international trade instruments;
- 2.2.2 Ensure strategic alignment and continued relevance within the dtic and national agenda; and
- 2.2.3 Ensure organisational efficiency and effectiveness through business support services.

2.3 Functional Areas of ITAC

There are two main functional areas of ITAC with supporting business units reporting there under, namely:

2.3.1 Core business

- Tariff Investigations.
- Trade Remedies.
- Import and Export Control.

2.3.2 Business Support Services

- Human Resources.
- Finance & Supply Chain Management.
- Communication Services.
- Information Technology.
- Internal Audit services.
- Legal Services.
- Policy and Research.
- Secretariat.
- Risk Management.

2.3.3 The Commission of ITAC

As compared to the other public entities in South Africa, ITAC has no Board of Directors but a Commission. The membership of the Commission is comprised as follows:

- Full time Chief Commissioner (CEO of ITAC).
- Full time Deputy Chief Commissioner.
- Part-time Commissioners (up to 10).

3. Project objective

To enable ITAC to achieve its mandate and strategic objectives, the services of a suitably qualified and experienced service provider to provide an enterprise software solution for an integrated single permit generation and submission platform for ITAC.

The primary objectives of the service required are as follows:

The issuing of permits is one of the core functions mandated to ITAC in terms of the ITA Act (71 of 2002). The various ITAC business units administer a variety of permits in line with the Act.

All manual permit systems need to be automated and integrated with the South African Revenue Services (SARS) customs systems. The manual processes are time consuming and prone to human error and it may expose ITAC to possible fraudulent activities.

4. Project Requirements and Deliverables

4.1. Project Requirements

- 4.1.1 The aim is to develop an enterprise software solution for an integrated single permit generation and submission platform for ITAC.
- 4.1.2 The redevelopment of ITAC's existing electronic Import and Export permit systems. In this case, data migration and integration is required.
- 4.1.3 The digitisation and automation of ITAC's manual, paper-based permit systems with regard to the other business units.
- 4.1.4 The various business units administer a number of permits for submission to SARS. These units have their own workflow requirements and the system must cater for the unique requirements for each permit.
- 4.1.5 All permits must be coded into the formats required by the South African Revenue Services (SARS).
- 4.1.6 ITAC also administers the Automotive Production Development Programme (APDP) and the same if required for this programme. A unique workflow, with automated calculations and the generation of an electronic permit for submission to SARS.
- 4.1.7 SARS requires all permits to be submitted in a very specific format.

- 4.1.8 The SARS interface uses the United Nations Directories for Electronic Data Interchange for Administration, Commerce and Transport (**UN/EDIFACT**) specification.
- 4.1.9 This specification provides the definition of the International movement of goods governmental regulatory message (SANCRT) to be used in Electronic Data Interchange (EDI) between trading partners involved in administration, commerce and transport.
- 4.1.10 The SANCRT message permits a commercial operator to apply to a national agency for the issue of a certificate, permit, authorization etc. in respect of products to be imported or exported. It further permits the issuing authority to transmit to the applicant and to the exporting or importing country's relevant national authority, (e.g. Customs, Agriculture etc.) the details of the certificate, permit or authorization in respect of those products thus facilitating the import/export clearance of the consignment whilst ensuring that all certificate, permit, authorization requirements are met.
- 4.1.11 The environment is Microsoft server based, with Microsoft SQL as the functional database application.
- 4.1.12 ITAC requires a cloud-based system with cloud-enabled features from inception.

4.2 Project Deliverables

The following will constitute deliverables for this project.

- 4.2.1 The development of a single integrated enterprise permit platform.
- 4.2.2 Full integration with the South African Revenue Services (SARS) customs systems.
- 4.2.3 The system must have advanced reporting and business intelligence capabilities.
- 4.2.4 The software must be "cloud-enabled" and must have the ability to be deployed on the Microsoft Azure platform. The cloud platform must be strictly "in-country".
- 4.2.5 All workflow configurations and automation must be in line with ITAC's business processes.
- 4.2.6 Migration of the legacy data to the new environment where required.
- 4.2.7 All permit applications submitted through an online portal.
- 4.2.8 Training and support for super users and the ITAC users will be critical at the implementation stages – therefore a detailed training plan and training method must be provided as part of the proposed project plan.
- 4.2.9 An integrated document management system with search and indexing capabilities.
- 4.2.10 Please note the User Requirements Annexure C attached. Annexure C contains the detailed requirements for the system.

NB: ITAC RESERVES THE RIGHT TO AMEND THE PROJECT DELIVERABLES WITHIN REASONABLE LIMITS AND CARE.

5. Expertise Required

During the evaluation of this project, the evaluation processes of ITAC will, *inter alia* consider the experience and credentials of the personnel proposed by the service providers on this project.

Please note that bidders must attach certified copies of all required qualifications, relevant certificates, and copies of comprehensive and updated curricula vitae for each employee who will be utilised for this project.

Please note that bidders must attach certified copies (not older than 3 months) of all required qualifications, relevant certificates, and copies of comprehensive and updated curricula vitae for the key personnel who will be utilised for this project.

6. Time Frames and Duration of Appointment

ITAC aims to have a single permit platform with multiple permits generated and submitted to SARS. The project however will be managed on a modular basis with the following as a breakdown:

- 6.1 Business Analysis and workflow mapping = not exceeding three months
- 6.1 Import permit system – not exceeding six (6) months
- 6.2 Export permit system – not exceeding six (6) months
- 6.3 APDP permit system – not exceeding twelve (12) months
- 6.4. Tariff permit system – not exceeding twelve (12) months

ITAC thus requires that all systems development is completed in 36 months.

A maintenance and support contract will be entered into after the first permit system has been completed, signed off and accepted.

7. Remuneration Condition

All claims for payment shall be submitted to ITAC on a monthly basis on condition that sufficient proof is submitted on progress made in respect of tangible deliverables, usable by ITAC, in terms of the project unless parties to the contract mutually decide and agree otherwise. ITAC's payment terms is 30 days from receipt of a valid invoice.

8. Contracting Process

The contracting between ITAC and the successful service provider shall come into effect upon receipt of the letter of appointment from ITAC and accompanied by a duly authorised copy of a purchase order from the Supply Chain Management Unit.

9. Special Provisions of Contract

Bidders are required to take note of the contents of the **Special Conditions of Contract**, which must be taken into consideration in preparing bid submissions and which shall form an integral part of the Contract Agreement between ITAC and the successful bidder.

- 9.1 The proposed total cost of the project must be clearly indicated.
- 9.2 The proposal must clearly outline a detailed plan on how skills transfer will be done to the identified employees of ITAC.
- 9.3 The project and implementation plan must be included.
- 9.4 ITAC reserves the right to accept in whole or in part the proposal or to reject the proposal.
- 9.5 An overview of the project methodology to be used by the service provider must be provided.
- 9.6 Bidders must note that verification of the National Treasury Database of Restricted Suppliers and Register of Tender Defaulters will be conducted to ensure that ITAC does not enter into any contractual agreements with the restricted service providers.

10. General Conditions of Contract

Bidders are required to take note of the contents of the **General Conditions of Contract**, as contained under **Annexure A**, which shall form an integral part of the Contract Agreement between ITAC and the successful bidder.

11. Bidding Documents to be Completed, Signed and Submitted

All the information contained herein, specifically that under **Clauses 3 to 12**; as well as all **Annexures** must be taken into account and used as a basis for the formulation of proposals and preparation of cost estimates.

All the required information under **Annexure B**, and all the annexure thereto, must be duly and comprehensively completed, signed and submitted.

- 11.1. Invitation to Bid (SBD 1);
- 11.2. Declaration of Interest (SBD 4);
- 11.3. Preference Points Claim Forms (SBD 6.1);
- 11.4. Service Level Agreement SLA / SBD 7.2 to be signed on appointment with the preferred service provider.

12. Legislative Framework of the Bid

12.1. Tax Legislation

12.1.1. Bidder(s) must be tax compliant when submitting a proposal to International Trade Administration Commission of SA and remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).

12.1.2. It is a condition of this bid that the tax matters of the successful bidder be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

12.1.3. The Tax Compliance status requirements are also applicable to foreign bidders / individuals who wish to submit bids.

12.1.4. It is a requirement that bidders grant a written confirmation when submitting this bid that SARS may on an ongoing basis during the tenure of the contract

disclose the bidder's tax compliance status and by submitting this bid such confirmation is deemed to have been granted.

12.1.5. Bidders are required to be registered on the Central Supplier Database and the National Treasury shall verify the bidder's tax compliance status through the Central Supplier Database.

12.1.6. Where Consortia / Joint Ventures are involved, each party must be registered on the Central Supplier Database and their tax compliance status will be verified through the Central Supplier Database.

12.2. Procurement Legislation

The International Trade Administration Commission of South Africa has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act, No. 1 of 1999), the Preferential Procurement Policy Framework Act 2000 (Act, No.5 of 2000) and the Broad-Based Black Economic Empowerment Act, 2003 (Act, No. 53 of 2003).

12.3. Technical Legislation and/or Standards

Bidder(s) should be cognizant of the legislation and/or standards specifically applicable to the services.

13. Contract Documents

13.1 This Request for proposal and all its Technical and Administrative Annexures, together with the accepted Bidding Documents, duly completed and submitted by the successful bidder, shall form part of the Contract Documentation, according to which this project shall be undertaken, managed and completed.

13.2 The contract shall commence upon receipt of the letter of appointment and the purchase order from ITAC by the successful bidder.

14 Evaluation of proposal received

The International Trade Administration Commission of South Africa has set minimum standards (stages) that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

Initial Screening process (Stage 1)	Technical Evaluation Criteria (Stage 2)	Price and Specific goals evaluation (Stage 3)
<p>Bidders must complete, sign and submit all Standard Bidding Documents (SBD), as outlined in paragraph 11. Bidders must also be Tax Compliant as per requirements of paragraph 12. Registration with the Institute of Internal Auditors is mandatory. (append certification).</p> <p>NB: Bidders will be disqualified if SBD 4 form is not submitted, not fully completed and signed. Bidders will also be disqualified if they are not Tax Compliant.</p>	<p>Bids will be evaluated as per the evaluation criteria for technical evaluation. Bidder(s) will be required to achieve a minimum of 70 points out of 100 points to proceed to Stage 3.</p>	<p>The 80/20 preference point system will be used to evaluate bids in Stage 3. Bidder(s) will be evaluated out of 100 points and Stage 3 will only apply to bidder(s) who have met and exceeded the minimum threshold of 70 points.</p>

- 14.1 ITAC reserves the right not to accept the lowest bid, as the elements listed in the evaluation matrix will play a major role, when evaluating bids. Additionally, ITAC is not bound to select any of the bidders or individuals submitting a proposal.
- 14.2 Prospective bidders are required to complete the SBD 6.1 form in order to qualify for specific goals as alluded under the evaluation criteria. The CSD report attached or printed by ITAC should also indicate same specific goals claimed as the points indicated on CSD would take precedent.
- 14.3 Prospective proposals will be evaluated in accordance with the 80/20 preference point system, as contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000). Bidders who obtain 70 out of 100 points in stage 2 (technical evaluation) will qualify for stage 3 (Price and specific goals) evaluation wherein 80/20 preference points system will be used as follows: 80 points for price and 20 points for specific goals.

In respect to the evaluation matrix, prospective bidders will be rated from 1 to 5 in that: 1 = very poor, 2 = poor, 3 = average, 4 = good, 5 = very good.

14.4 To ensure meaningful participation and effective comparison, bidders are requested to furnish detailed information to substantiate compliance with the evaluation criteria.

Stage 2 (Criteria for Technical Evaluation)

Evaluation Criteria	Weight	Scoring
<p>Methodology and Project Approach</p> <p>The proposal must at the least address the following:</p> <p>Demonstrated software development capability that must include at a minimum the following: A clear deployment/rollout plan Risk mitigation plan Training plan The technology that will be employed IT security measures The application development frameworks and methodologies Integration capability</p> <p>Software testing plan with the inclusion of a prototype within the set timeframes.</p> <p>Cloud hosting capability</p> <p>Phased, modular implementation of requirements and features</p>	<p>40</p>	<p>25 points</p> <p>5 points</p> <p>5 points</p> <p>5 points</p>
<p>Presentation</p> <p>Presentation must not exceed 15 minutes. The presentation must focus on: - Summary of the technical proposal</p>	<p>10</p>	

<ul style="list-style-type: none"> - Project methodology and phased development - Integration capability - Business process mapping 		
<p>Relevant Experience in completing complex projects The bidder must provide similar ICT software solutions to any three (3) organisations during the past ten (10) years.</p> <p>Bidders must include 3 reference letters from clients that they have successfully provided a software development and hosting solutions in the last 10 years. The reference letters must be on company letterheads and must include the type of project, with contact details for ease of reference.</p> <p>The bidder must at least have a minimum of 10 years' experience in delivering similar projects.</p>	<p>15</p>	<p>5 = > 4 letters 4 = 4 letters 3 = 3 letters 2 = 2 letters 1 = 1 letter</p> <p>5 = > 12 years' relevant experience 4 = 11-12 years' relevant experience 3 = 10 years' relevant experience 2 = 7-8 years' relevant experience 1 = < 7 years' relevant experience.</p>
<p>Experience of the Technical Team mention below (certified copies (not older than 3 months) of all qualifications, relevant certificates, and comprehensive and</p>	<p>35</p>	

<p>updated curricula vitae is required)</p> <p>Project leader Detailed curriculum vitae with a total of 10 years' expertise on similar projects.</p> <p>Lead developer Detailed curriculum vitae with a total of 10 years' expertise on similar projects</p> <p>Cloud and hosting expert Detailed curriculum vitae with a total of 5 years' expertise on similar projects</p>		<p>5 = >10 combined experience in related area</p> <p>4 = 10 years combined experience in related area</p> <p>3 = 8 years combined experience in related area</p> <p>2 = 5 years combined experience in related area</p> <p>1 = <5 years combined experience in related area</p> <p>,</p> <p>5 = >10 combined experience in related area</p> <p>4 = 10 years combined experience in related area</p> <p>3 = 8 years combined experience in related area</p> <p>2 = 5 years combined experience in related area</p> <p>1 = <5 years combined experience in related area</p> <p>5 = >5 combined experience in related area</p> <p>4 = 5 years combined experience in related area</p> <p>3 = 4 years combined experience in related area</p> <p>2 = 3 years combined experience in related area</p> <p>1 = <3 years combined experience in related area</p>
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NB: Bidders who obtain 70 out of 100 points in Stage 2 (Technical Evaluation) will qualify for the Stage 3 (Price and specific goals) evaluation wherein 80/20 preference points system will be used as follows: 80 points for price and 20 points for specific goals.

Stage 3 (Criteria for Price and specific goals)

Criteria	Points
Comparative Bid Price	80
Specific goals	20
TOTAL	100

$$Ps = 80 \left(1 - \frac{Pt - P \text{ min}}{P \text{ min}} \right)$$

The following formula will be used to calculate the points for price:

Where

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

a. Specific goals (points) allocation

A maximum of 20 points may be allocated to a bidder for attaining their specific goals in accordance with the table below:

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
100% Black Owned	6	
51% - 99% Black Owned	4	
100% Black Women Owned	6	
51% - 99% Black Women Owned	4	
5% Youth Owned	2	
2% Owned by Persons with Disabilities	1	
Business in township, rural or underdeveloped area	2	
Exempt Micro Enterprise (EME)	3	
Qualifying Small Enterprise (QSE)	2	

Specific goals points may be allocated to bidders on submission of the following documentation or evidence:

- A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1); and
- B-BBEE Certificate or Sworn Affidavit (originally certified copies).

The Price and Specific goals points will be consolidated.

ITAC will use the information in the duly completed Bidding Documents submitted as well as the required supportive documentation to evaluate each bid against the criteria provided in page 11 to 12.

b. Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture, will qualify for points for their specific goals as a legal entity, provided that the entity submits their B-BBEE status level certificate or Sworn Affidavit.

A trust, consortium or joint venture will qualify for points for their specific goals points as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. **International Trade Administration Commission of South Africa** will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

15. Closing Date and time

The closing date and time for the submission of the proposal is 08 December 2023 at 11h00 am.

- **Delivery address**

The DTIC Campus, Block E first floor 77 Meintjies Street, Sunnyside Pretoria 0002

16. Proposal Submission / Responses

Bidders will be required to use the two envelope system, whereby the technical proposal (stage 2) and pricing and specific goals (stage 3) are placed in two separate envelopes and clearly marked:

TECHNICAL PROPOSAL – Bidders must submit one (1) original and four (4) hard copies of the bid proposal. The original file / envelop must be packaged as follows and clearly marked as “Original”

	Part 1a – Standard Bidding Documents and Administrative Compliance
1	SBD 1-Invitation to Bid
2	SBD 4 – Fully completed and signed Bidder’s Disclosure
3	SBD 6.1 – Completed and signed Preference Points Claim Form
4	SBD 7.2 – Completed and signed form
5	General Conditions of Contract – Initial each page and sign the last page
6	Bidder’s technical proposal
7	Certified copy (s) of academic or tertiary qualifications
8	Other supporting documents

NB: Bidders will be disqualified if SBD 4 – form is not submitted, not fully completed and signed. Bidders will also be disqualified if they are not Tax Compliant.

FINANCIAL / PRICE PROPOSAL

NB: The bidder must submit one (1) original financial / price proposal and four (4) hard copies and the envelop must be submitted separately from the technical proposal. The bid validity period is 120 days.

17. Non-compulsory briefing session (Hybrid)

Please see bid briefing session details below:

Date: 23 November 2023

Time: 11h00 am

Venue: First floor, Block E, DTIC Campus, 77 Meintjies Street, Sunnyside, Pretoria

18. Enquiries

Supply Chain Management

Name: Ms. PS Mkhungo

Email: pmkhungo@itac.org.za

Tel: 012 3943700

Technical Project

Name: Mr. Russel Nelson

Email: nelson@itac.org.za

Tel: 012 3943642

NB: ITAC RESERVES THE RIGHT TO AMEND THE PROJECT SPECIFICATIONS WITHIN REASONABLE LIMITS.

19. ANNEXURES:

ANNEXURE A: GENERAL CONDITIONS OF CONTRACT

ANNEXURE B: STANDARD BIDDING DOCUMENTS

ANNEXURE C – ADDENDUM (EVALUATION CRITERIA)

ANNEXURE C: EVALUATION CRITERIA

A. Systems capabilities

- a.1. Enable customers to submit all applications online through the web portal
- a.2. Integration with the SARS.
- a.3. Users able to track, review and manage submitted applications, track activities (e.g. decision making committee outcomes), see application statuses and respond to queries online.
- a.4. User management for:
 - a. Unlimited user creation and access control
 - b. Profile management
 - c. User grouping management
 - d. Categorization
 - e. Access Control List (ACL) functionalities.
- a.5. Advanced reporting and business intelligence capabilities
- a.6. "Cloud-enabled"

B. General requirements

- b.1. Web client – system must be accessed through a web client
- b.2. IT Security standards – system must conform to the latest IT security standards and POPIA compliance

C. User management

- c.1. Secure user account creation
- c.2. User access categorisation
- c.3. User profiles creation according to job function
- c.4. Administrator access to control user account creation and access

D. Document management

- d.1. An integrated document management system that allows for the upload of all application and supporting documentation
- d.2. Secure document workflow according to user profile

E. Online application registration and application portal

- e.1. Create a portal for customer registration and applications
- e.2. Smart application capabilities to guide users

F. Application management

- f.1. Applicants must track and manage (review and update) applications

G. Systems integration

- g.1. Platform must be integrated with the relevant SARS customs systems
- g.2. Permits and other generated documents electronically submitted to SARS
- g.3. Backwards integration with SARS system to track permit utilisation
- g.4. EDI and well as API integration depending SARS requirements

H. IT Security

- h.1. Integrated anti-virus and anti-malware scanning
- h.2. User access control

I. Reporting

- i.1. Dashboard for super users and senior managers
- i.2. Dashboard for individual users based on user access
- i.3. Advanced reporting and business intelligence functionality
- i.4. Customised reports in various formats
- i.5. Advanced search functionality

J. Supplier services

The following services are required by the appointed service provider:

- j.1. Business analysis services
- j.2. Project Management services
- j.3. Consulting services
- j.4. Training services
- j.5. Licensing services

K. Geo-location and/or Geo-mapping functionality

It is crucial for ITAC to know where our customers and stakeholders are located. ITAC will provide a detailed list of all data requirements to the winning bidder.

L. System ownership and Intellectual property

I.1. All ownership and intellectual property resides with ITAC.

I.2. The appointed service provider is prohibited from owing any part of the system