



MICTSETA |

Media, Information And
Communication Technologies
Sector Education And Training Authority

SHAPING SKILLS, PIONEERING INDUSTRIES, EMPOWERING FUTURES

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE MEDIA INFORMATION AND
COMMUNICATIONS TECHNOLOGIES SECTOR EDUCATION AND TRAINING AUTHORITY**

REQUEST FOR BIDS REF: MICT/SETA/ERP/07/2024

REQUIREMENT DESCRIPTION:

**APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION, SUPPORT AND MAINTANANCE
OF AN INTEGRATED INDUSTRY LEADING COMMERCIAL OFF THE SHELF ENTERPRISE
RESOURCE PLANNING (ERP) SYSTEM TO MICT SETA FOR A PERIOD OF FIFTY-FOUR (54)
MONTHS**

BID CLOSING DATE: 25 March 2025 at 11:00 AM



| | |
|--|---|
| Bid Reference Number | MICT/SETA/ERP/07/2024 |
| Bid Description | APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION, SUPPORT AND MAINTANANCE OF AN INTEGRATED INDUSTRY LEADING COMMERCIAL OFF THE SHELF ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM TO MICT SETA FOR A PERIOD OF FIFTY-FOUR (54) MONTHS |
| Supplier Briefing Session | <u>Compulsory Virtual Briefing Session will be held as follows:</u> Date: 06 MARCH 2025 Time: 11:00 am South African Time Location: Microsoft Teams Meeting ID: 390 898 210 253 Passcode: CF382bV7 <u>PLEASE NOTE: BIDDERS THAT DO NOT MEET ATTEND THE COMPULSORY BIDDERS CONFERENCE WILL BE ELIMINATED FROM FURTHER EVALUATION PROCESS.</u> |
| Bid Closing date & time | 25 March 2025 @ 11:00 am South African Time. <i>*Note: A bid will not be considered if it arrives a second after 11:00 am or any time thereafter. Bidders are therefore strongly advised to ensure that bids are dispatched allowing enough time for any unforeseen events that may delay the delivery of the bid.</i> |
| Instruction for submission of Bid | Bid must be received in a sealed envelope (1 hard copy and 1 USB) marked with this RFB reference number and deposited in a tender box at the location indicated hereunder. |
| Location for Bid submissions | MICT SETA Head Office: Reception 19 Richards Drive, Gallagher Convention Centre West Wing, Level 3 Midrand |
| Bid Validity Period | Bids received shall remain valid for acceptance for a period of 120 days counted from the closing date of the bid. |

CLARIFICATION AND COMMUNICATION

- All enquiries relating to this bid must be addressed in writing to bidqueries@mict.org.za five days **before the closing date and time**. Queries received after this period will not be entertained.
- The bid reference number must be mentioned in all correspondences.

Note: Bidders are advised that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of **MICT- SETA** in respect of the RFB, between the closing and award date of the business.

SUPPLIER REGISTRATION ON CSD

Prospective suppliers must register on the National Treasury Central Supplier database in terms of National Treasury circular no 4A of 2016/17. The bidder shall register prior submitting a proposal/bid.



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**RETURNABLE DOCUMENTS CHECKLIST**

Bid invitation document must be completed, signed and submitted as a whole by the authorised Company representative. All forms must be properly completed, list below serve as a checklist of your RFB submission.

(Tick in the relevant block below)

| DESCRIPTION | YES | NO |
|--|-----|----|
| CSD Central Supplier Database (CSD) Registration Report | | |
| SBD 1 - Fully completed with required proof (Where applicable) | | |
| CIPC registration documents | | |
| Valid Tax Clearance Certificate (S) and or proof of application endorsed by SARS / and or SARS issued verification pin | | |
| SBD 4 - Declaration of interest | | |
| SBD 6.1: Preferential Procurement Claim Form | | |
| Copy of joint venture/ consortium or sub-contracting agreement duly signed by all parties. (Where applicable) | | |
| Financial Statements for 2023/2024 FY of the bidder | | |

Note: This BID must be completed and signed by the authorised company representative.



SBD 1: PART A: INVITATION TO BID

| SUPPLIER INFORMATION | | | | |
|---|---|--|--|---|
| NAME OF BIDDER | | | | |
| POSTAL ADDRESS | | | | |
| STREET ADDRESS | | | | |
| TELEPHONE NUMBER | CODE | | NUMBER | |
| CELLPHONE NUMBER | | | | |
| FACSIMILE NUMBER | CODE | | NUMBER | |
| E-MAIL ADDRESS | | | | |
| COMPANY REGISTRATION NUMBER | | | | |
| DATE OF REGISTRATION | | | | |
| VAT REGISTRATION NUMBER | | | | |
| | TCS PIN: | | OR | CSD No: |
| AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX | <input type="checkbox"/> | AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) | | |
| | <input type="checkbox"/> | A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS) | | |
| | <input type="checkbox"/> | A REGISTERED AUDITOR | | |
| | | NAME: | | |
| | | | | |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF] | | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ANSWER PART B:3 BELOW] |
| SIGNATURE OF BIDDER | | | DATE | |
| CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc. | | | | |
| TOTAL NUMBER OF ITEMS OFFERED | Refer to pricing schedule/costing | | TOTAL BID PRICE (ALL INCLUSIVE) | Refer to pricing schedule/costing |

**PART B: TERMS AND CONDITIONS FOR BIDDING****BID SUBMISSION:**

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR ONLINE.
- 1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES).
- 1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION.
- 1.5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.

TAX COMPLIANCE REQUIREMENTS:

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- 3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO
- 3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
- 3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
- 3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

**BIDDING STRUCTURE****Bidding structure**

Indicate the type of bidding structure by marking with an 'X':

| | |
|-------------------|--|
| Individual bidder | |
| Joint Venture | |
| Consortium | |
| Subcontractors | |
| Other | |

If the bid is submitted as a Consortium or Joint Venture or Sub-Contracting Arrangement list the members of such Consortium or Joint Venture and Sub-Contractors below:

Bidder's Information (includes bids submitted Individual or as a Consortium or Joint Venture)

| | |
|--|--|
| Supplier size type (Large or QSE or EME) | |
| First time business with MICT SETA (Yes/No) | |
| Number of existing running contracts and total value | |
| Total number of Employees | |

Entity ownership

| Ownership category | % of ownership |
|---|----------------|
| Black or historically disadvantage individual owned | |
| Black women owned | |
| Black youth owned | |
| People living with disability | |
| Military veteran | |
| Other ownership | |
| Total (100%) | |

**MICT SETA -BID CONDITIONS****1. BID CONDITIONS**

NOTE: Bids for the supply of goods or services described in this document are invited in accordance with the provision of Government Procurement: General Conditions of Contract available for download from <http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/>

- a. **MICT SETA** does not bind itself to accept the lowest or any RFB, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of the RFB.
- b. No RFB shall be deemed to have been accepted unless and until a formal contract / letter of intent is prepared and executed.

1.1 MICT SETA reserves the right to:

- a. Not evaluate and award RFB that do not comply strictly with the requirements of this RFB.
- b. Make a selection solely on the information received in the RFBs and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the evaluation of this RFB.
- c. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders and no change in the content of the RFB shall be sought, offered or permitted.
- d. Award a contract to one or more bidder(s).
- e. Withdraw the RFB at any stage
- f. Accept a separate RFB or any RFB in part or full at its own discretion.
- g. Cancel this RFB or any part thereof at any stage as prescribed in the PPPFA regulation.
- h. Select the bidder(s) for further negotiations on the basis of the greatest benefit to MICT SETA and not necessarily on the basis of the lowest costs

2. COST OF BIDDING

The bidder shall bear all costs and expenses associated with preparation and submission of its RFB or RFB, and the MICT SETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.



TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION, SUPPORT AND MAINTANANCE OF AN INTEGRATED INDUSTRY LEADING COMMERCIAL OFF THE SHELF ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM TO MICT SETA FOR A PERIOD OF FIFTY-FOUR (54) MONTHS

3. INTRODUCTION

The Media, Information and Communication Technologies Sector Education and Training Authority (MICT SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act (Act No. 97 of 1998). The MICT SETA plays a pivotal role in achieving South Africa's skills development and economic growth within the 5 distinct sub-sectors it operates in; i.e., Advertising, Film and Electronic Media, Electronics, Information Technology, and Telecommunications.

The MICT SETA's Head Office is based in Gauteng, with four Regional Offices in the following provinces:

- i. Kwa-Zulu Natal;
- ii. Western Cape;
- iii. Eastern Cape; and
- iv. Free State.

4. BACKGROUND

To fulfil its mandate, MICT SETA relies on a variety of technology systems and infrastructure that must always be operational. As driven to support the National System of Innovation through the implementation of its Digital Strategy, MICT SETA is looking to source an Integrated Industry Leading Commercial Off the Shelf ERP system, such as Microsoft Dynamics 365, Oracle or other similar, that are suitable for services-based organizations, that will improve efficiency and effectiveness in its value chain.

MICT SETA is seeking to implement its Digital Strategy by improving its digitisation and automation agenda through provision, support and maintenance of an Integrated Industry Leading Commercial Off the Shelf Enterprise Resource Planning (ERP) solution for service organisations as recognised by institutions involved in research. Key amongst MICT SETA priorities are:

- Organisational sustainability through internal business excellence by resource management such as financial, human capital, technology, and information and knowledge management.
- Increase in innovation through digital transformation.
- Prevention, detection, and resilience against increased risk of cybercrime.
- Eliminate repetitive manual processes and data silos.

4.1 Current System

Currently, MICT SETA is utilising Sage as ERP system, which has been instrumental in supporting its operations within the following business units:

- Supply Chain Management (SCM),
- HR Payroll and Employee Self-Service (ESS),
- Human Resource Management (HRM), and
- Finance Business Units.

Looking ahead, the MICT SETA aims to transition to a modernised, integrated and industry leading, web-based ERP System.

The goal is to digitise all business processes, moving towards a paperless, seamless, and automated solution. We envision a highly integrated and automated system that will enhance our efficiency and effectiveness.

4.2 MICT SETA Establishment and Footprint

The MICT SETA org structure is designed as follows:

| PROGRAMME | DIVISION / BUSINESS UNIT | NUMBER OF USERS |
|-------------------------|--|------------------------|
| 1 | Administration | |
| | • Board Secretary's Office | 3 |
| | • Corporate Services | 1 (Senior Manager: CS) |
| | o Human Resources | 6 |
| | o Marketing and Communication | 7 |
| | • Finance | |
| | o Financial Management | 13 |
| | o Supply Chain Management | 6 |
| | • Information and Communications Technology | 9 |
| | • Office of the CEO (OCEO) | 3 |
| | o Internal Audit | 4 |
| | o Legal and Compliance | 1 |
| | o Risk and Compliance | 3 |
| | • Monitoring and Evaluation (M&E) | 5 |
| 2 | Sector Skills Planning (SSP) | 7 |
| 3 | Learning Programmes (LPD) | 27 |
| | Fourth Industrial Revolution (4IR) | 6 |
| 4 | Education and Training Quality Assurance (ETQA) | 22 |
| Regional Offices | • Eastern Cape | 6 |
| | • Free State | 2 |
| | • KwaZulu-Natal | 10 |
| | • Western Cape | 8 |

The footprint is reflected below:

| | |
|--|--|
| Head Office Block 2, Level 3 West Gallagher Convention Centre Halfway House Midrand 1685 | Eastern Cape Regional Office (East London) 12 Esplanade Quigney East London 5201 |
| Free State Regional Office Motheo Tvet College (Faculty Tourism and Hospitality) Cnr Goddard Street / O.R Tambo Bloemfontein 9301 | Kwazulu-Natal (Durban) 39 Vuna Close, 14 th Floor Umhlanga Ridge Kwa-Zulu Natal 4319 |
| Western Cape Regional Office (Cape Town) The Boulevard Office Park Block F Ground Floor Searle Street Woodstock 7925 | Klerksdorp Satellite Office Vuselela Tvet College Jourberton Centre For Engineering Studies 11900 5th Street, Jourberton Township |

5. PURPOSE, OBJECTIVES, SCOPE AND REQUIREMENTS

The purpose of this procurement process is to source a modernised and integrated industry leading commercial off the shelf ERP system to improve adequacy and integration of automated / digitised processes of MICT SETA. Limited customer platforms due to inadequate integrated and automated / digitised processes.

5.1 Purpose

The purpose of this procurement process is to source a modernised and integrated industry leading ERP system to improve adequacy and integration of automated / digitised processes of MICT SETA. Limited customer platforms due to inadequate integrated and automated / digitised processes.

5.2 Objectives

The objectives of the project are to:

- 5.2.1 Improve compliance with legislative imperatives.
- 5.2.2 Automation / Digitisation of MICT SETA's Business Processes.
- 5.2.3 Provide visibility into financial performance and workforce metrics, for informed decision making.
- 5.2.4 Improve operational efficiency by standardising processes and optimising resource utilisation.
- 5.2.5 Eliminate manual paper-based processes embedded in the control environment.
- 5.2.6 Improve the ability to process transactions timeously.
- 5.2.7 Prevent the loss of records / Portfolio of Evidence leading to reliability of reports.
- 5.2.8 Eliminate duplication of functions / repetition of tasks and improve automation and integration with relevant internal and external stakeholders.
- 5.2.9 Mitigate risks associated with financial transactions, payroll processing, employee management, and supply chain disruptions.
- 5.2.10 Enable generation of comprehensive reports and analytics to monitor Key Performance Indicators (KPI's) and Key Performance Areas (KPA's), track performance trends, and facilitate strategic planning.

5.3 Project Scope and Requirements

The following sub-sections provide minimum requirements which bidders are required to comply with in order to be considered successful and eligible for appointment:

- 5.3.1 The scope of the services required for the integrated ERP solution includes but not limited to the sourcing, installation, configuration, maintenance and support of the system as per the minimum requirements of the bid. This includes the customization and configuration of the system to align with the business rules and policies of MICT SETA.
- 5.3.2 The scope of the services required for the integrated ERP solution includes but not limited to the implementation of key processes summarised below:
- Financial Management Module.
 - Human Resources and Payroll Module.
 - Other business Requirements.

6. MINIMUM REQUIREMENTS

6.1 Functional Requirements

6.1.1 Financial Management

The recommended system must comply with the following minimum requirements of the Financial Management module:

6.1.2 Accounts Payable Module

- 6.1.2.1 Three-way match, selection for payments for Purchase Requisitions, Quotations, Purchase Orders, Invoices / Purchase Receipt.
- 6.1.2.2 Integrate with Cashbook module for automatic matching of invoices and payments.
- 6.1.2.3 Integrate with Fixed Assets module for posting of assets.
- 6.1.2.4 Integration with the LMS system on the Calculation of mandatory grants based on approved WSP/ATR submissions.
- 6.1.2.5 Integration with the LMS system on payment of invoices
- 6.1.2.6 Download bank upload file for loading onto the banking system.
- 6.1.2.7 Integrate journals for accounts payable transaction type recorded in the general ledger module.
- 6.1.2.8 Age Analysis report.
- 6.1.2.9 Outstanding purchase orders reports – report of purchase orders not receipted.
- 6.1.2.10 Goods/Services Received not yet invoiced report.
- 6.1.2.11 Print and email remittance advice.
- 6.1.2.12 Allow for workflow management.

6.1.3 Accounts Receivable Module

- 6.1.3.1 Capture and print invoices.
- 6.1.3.2 Integrate with Cashbook module for receipts.
- 6.1.3.3 Integrate journals for accounts receivable transaction type recorded in the general ledger module.
- 6.1.3.4 Integration of the DHET levy files into the MICT SETA accounting systems and creation of posting journals

6.1.4 Cash Book Module

- 6.1.4.1 Uploading of bank statements from banking system.
- 6.1.4.2 Automatic bank reconciliations.

6.1.4.3 Integrate with Accounts Receivable and Accounts Payable system for posting of payments/receipts (automatic matching).

6.1.5 Fixed Assets module

- 6.1.5.1. Asset Management (asset tag number, serial number, asset description, asset location, quantity, cost, depreciation, accumulated depreciation, net book value, disposals)
- 6.1.5.2. Automatic depreciation calculation
- 6.1.5.3. Depreciation expense detailed and summary report.
- 6.1.5.4. Disposals, Transfers, Additions report
- 6.1.5.5. Fixed Assets detailed and summary register.
- 6.1.5.6. Electronic Asset verification.

6.1.6 Management Accounts

- 6.1.6.1 Variance report for Balance Sheet and Income Statement (detailed and summarised).
- 6.1.6.2 Monthly, Quarterly and Year to Date reports.
- 6.1.7 Financial Statements – Generally Recognised Accounting Principles (GRAP) compliant.
- 6.1.7.1 Processing and management accounts and reporting.
- 6.1.7.2 Processing of financial statements and reporting.

6.1.8 Human Resources Management

The proposed system must comply with the following minimum requirements of the HR module:

- 6.1.8.1. Personnel Management
- 6.1.8.2. Organisational management and organisational structure maintenance
- 6.1.8.3. Benefits Administration
- 6.1.8.4. Have ability to be configured and aligned with the organisational policies (all types of leave, performance bonus)
- 6.1.8.5. Employment Equity reports
- 6.1.8.6. Talent Management
- 6.1.8.7. Training administration management
- 6.1.8.8. Bursaries applications and administration
- 6.1.8.9. Reporting
- 6.1.8.10. E-Recruitment integration
- 6.1.8.11. Employment Equity
- 6.1.8.12. Management of employee lifecycle from onboarding to termination
- 6.1.8.13. E-filing / classification of records
- 6.1.8.14. Labour / Employee Relations
- 6.1.8.15. Employment Equity Reporting

6.1.9 Payroll Administration

- 6.1.9.1 Enterprise Compensation Management
- 6.1.9.2 Salary budget system
- 6.1.9.3 Payroll management – Finance
- 6.1.9.4 Provide leave balance monthly and reflect it on employees' payslips.
- 6.1.9.5 Calculate leave provision based on leave balance and payroll data.
- 6.1.9.6 General leave provision report for interface into the General Ledger module
- 6.1.9.7 Ability to manage / update tax tables as per SARS legislation.
- 6.1.9.8 Integration of payroll cost data to post to the General Ledger module.

6.1.10 Performance Management

6.1.10.1 Automation of Performance Management policy.

6.1.10.2 Employee Performance management entering, tracking, and rating.

6.1.11 Employee Self-Service

6.1.11.1 Web-based online portal for employee self-service leave application.

6.1.11.2 Online-Leave management

6.1.11.3 System should generate leave reports.

6.1.11.4 Allow for notification and prompts.

6.1.12 Reporting

The system must embed latest technologies to enable production of reports required by the affected processes. Some of the reports should include:

- The ERP System should be able to generate comprehensive reports and analytics tailored for the needs of MICT SETA to monitor Key Performance Indicators (KPI's) and Key Performance Areas (KPA's), support decision- making, track performance trends, facilitate strategic planning, supplier performance, Payroll information and financial reports, etc. These reports should be able to be classified as Monthly, Quarterly and Annual Reports.
- Legislated Reports
- Audit Trails
- System performance reports.

6.2 Non-Functional Requirements

6.2.1 Integration

To achieve MICT SETA's objectives, the proposed system must use latest technologies such as Application Programming Interface (APIs) to integrate with other relevant internal and external systems. This integration will enhance user experience and work-life balance. The systems / parties for integration are listed below:

6.2.1.1 Internal:

- 6.2.1.1.1 Azure Active Directory (AAD)
- 6.2.1.1.2 Integrated Learner Management System (ILMS)
- 6.2.1.1.3 Intranet
- 6.2.1.1.4 E-recruitment
- 6.2.1.1.5 Digital Signatures

6.2.1.2 External:

- 6.2.1.2.1 Banking institutions
- 6.2.1.2.2 Central Supplier Database (CSD)
- 6.2.1.2.3 Companies and Intellectual Property Commission (CIPC)
- 6.2.1.2.4 South African Revenue Service (SARS)
- 6.2.1.2.5 Unemployment Insurance Fund (UIF)

The list above is not exhaustive. The service provider must implement and support all integration points for both current and future systems. The scope of work, costs, and skills submitted with the bid must reflect these requirements.

6.2.2 Master Data / General Ledger / General

The system must comply with the following minimum requirements for design and functionality:

- 6.2.2.1 All modules within the ERP system must have master data functionality (common data should be shared across all modules)
- 6.2.2.2 General Ledger transactional reports
- 6.2.2.3 Trial Balance by account by cost centre, as well as consolidated
- 6.2.2.4 All modules must allow for drilling down of transactions.
- 6.2.2.5 Allow for capturing of journal transactions.
- 6.2.2.6 All modules should allow for unique transaction types.
- 6.2.2.7 All modules should have audit trail.
- 6.2.2.8 All modules should allow for independent locking of the modules.
- 6.2.2.9 Super user functionality.
- 6.2.2.10 Allow for budget and forecast loading by cost centre by account.
- 6.2.2.11 Generating reports exception, statistics, and monitoring reports in all the modules.
- 6.2.2.12 Where required, workflow management is critical.
- 6.2.2.13 Income & expenditure budgeting

6.2.3 Workflow Configuration

- 6.2.3.1 All workflows' configurations will be implemented as the Segregation of Duties Matrix of the MICT SETA

6.2.4 Licensing, Subscription, and Intellectual Property (IP) Rights The following will apply:

- 6.2.4.1 The system and its license must carry OEM / OSM warranty for the duration of the contract.
- 6.2.4.2 Documentation and artefacts produced during the duration of this contract shall remain the property of The MICT SETA.
- 6.2.4.3 All equipment and peripherals procured and supplied for this solution will remain permanent assets of the MICT SETA.
- 6.2.4.4 Continuity and availability of the system must comply with the MICT SETA policies and procedures; Business Continuity Plan and its Annexes.

6.2.5 Hosting and Disaster Recovery

The successful bidder will be responsible for:

- 6.2.5.1 Providing hosting platform requires of the system which will be provisions by MICT SETA. MICT SETA will provide cloud hosting platform for the Dev, QA, and Production sites. In addition, MICT SETA will provide DR facility for the system.
- 6.2.5.2 Provide hosting resource requirements for successful implementation of operation of the system, as part of proposal submission of this bid
- 6.2.5.3 Submit a comprehensive solution architecture showing different platforms in the primary hosting site and how the hosting site integrates with the DR site. The solution architecture must also include integration with other third- party solutions / applications.
- 6.2.5.4 Usage of the provided access rights for implementation, support, and maintenance of the system.
- 6.2.5.5 All installations, configurations, support, and maintenance of all system instances in all platforms in the main hosting site and DR facility in line with MICT SETA policies.
- 6.2.5.6 Providing guarantee for high availability of the solution with fail-over capabilities.

6.2.6 Data Migration

The bidder will be responsible for:

- 6.2.6.1 Transfer and migration of data from the current ERP system and its contents to the new ERP system during transition to the new system.
- 6.2.6.2 Handover of all Intellectual Property (IP) within their possession, including but not limited to, the latest version of the systems, plug-in / runtime environment settings and data to MICT SETA, when the services terminate for any reason whatsoever, including but not limited to contract expiry.
- 6.2.6.3 Ensure that the pricing proposal submitted with the bid includes data migration / taken on commencement of contract and handover of data on termination of the contract.
- 6.2.6.4 Ensure that the provided solution automates data acquisition from other systems (automated or manual), at certain intervals, produce exception reports for errors in acquired data, and contact built-in rules for data management.

6.2.7 Training and Skills Transfer

The successful bidder will be responsible for:

- 6.2.7.1 Establish adequate support processes which should include first line, second line, third line, including channels for OEM / OSM integration and support. The support processes must include after-hours support, with escalations.
- 6.2.7.2 Handholding and on the job training to users of the system and internal technical resources.
- 6.2.7.3 User training to ensure that all users are at acceptable levels of performing their functions through the system.
- 6.2.7.4 Admin training for improved support.
- 6.2.7.5 Train the trainer and capacity building.

6.2.8 Support and Maintenance

The successful bidder will be responsible for:

- 6.2.8.1 System and user support.
- 6.2.8.2 System optimisation to ensure improved user experience, realise value for money, and business efficacy.
- 6.2.8.3 Maintenance and update of existing plug-ins and associated runtime environment applications.
- 6.2.8.4 Conduct updates backups to safeguard the system.
- 6.2.8.5 Periodic backup reports must be presented to MICT SETA.
- 6.2.8.6 The bidder will be required to perform Health Checks on the system to improve its performance.
- 6.2.8.7 The successful bidder will be required to keep accurate record of and communicate system and service-related risks to MICT SETA timely at the relevant platforms, and to maintain updated Risk Registers.
- 6.2.8.8 The successful bidder will be required to perform Software Deployment on all equipment (new software, software upgrades, software patches, and service packs) without impacting MICT SETA business operations.
- 6.2.8.9 The bidder shall form part of DR drills and execution of the MICT SETA Business Continuity Plan and its Annexes.
- 6.2.8.10 Clearly indicate the provision of an on-site support service as and when required and the cost/ rate thereof. The below table is a guide on the Mean Time to Resolve in the event of system failure:

| Urgency | Definition | Resolution Time |
|---------|--|-----------------|
| 1 | Non-availability of system by all users that cannot function for which an alternative solution or workaround is not immediately available. | 2 hours |
| 2 | Recurrent problems that have a high business impact | 4 hours |
| 3 | services are hindered by any system errors, but workaround measures are in place to ensure business continuity | 6 hours |

6.2.9 Compliance and Security

The successful bidder will be responsible for:

- 6.2.9.1 Ensuring that the system meets all relevant compliance requirements.
- 6.2.9.2 Ensuring that the system complies with all security requirements in line with MICT SETA policies and procedures.

6.2.10 Testing

The selected bidder shall conduct system testing of the ERP system, application and any customized components such as:

- 6.2.10.1 Unit Testing
- 6.2.10.2 Performance/Volume testing
- 6.2.10.3 System integration testing
- 6.2.10.4 User acceptance testing

7. PROJECT METHODOLOGY AND APPROACH

Bidders must submit a detailed Project Plan (GANTT chart) including methodology statement that responds to the project. The Gantt Chart must provide activities for the successful implementation of the project and its activities. The activities must include the following, *inter alia*:

a. Duration of Contract

- The contract will commence upon appointment of the service provider.
- The contract shall endure a duration of fifty-four (54) The project duration and billing milestones shall be aligned with the Project Scope and System Requirements detailed above, and support and maintenance of services as articulated in the bid document.

b. Project Implementation Plan

Project Plan: must demonstrate the following key areas of consideration:

- Project Management methodology
- Project Phases (based on delivery timelines)
- Project Activities as per the scope of work
- Timelines
- Resource Allocations

c. Project Methodology

The Project Methodology must articulate how ALL the activities of the project / contract are to be performed according to the below steps:

- **Project Planning** – Define the project scope, objectives, and timelines.
- **Project Resource Allocation** – e.g., Technology, Human Resources, Customer support, Integration with existing systems, etc.



- **Technology Selection and Systems Integration** – Choosing the appropriate ERP software based on MICT SETA's specific requirements. Detailing how Integration with Home-Affairs, Banks, SARS, Internal Systems etc, will be done.
- **User Training** – Detailing the approach of how the users of the system will be trained.
- **Continuous Improvement** – Regularly review and update the ERP based on feedback, changing business needs and advancements in technology.

8. RISK MANAGEMENT PLAN

Bidders must indicate what risks are prevalent in the implementation of new ERP System, especially in an environment that is migrating from another ERP System. This must include a risk mitigation strategy or plan for each identified risk. At a minimum the risks listed should include but not limited to the following:

- Data Migration Risks
- Business Process Misalignment
- Change Management Risks
- Technical Risks
- Project Management Risks
- Financial Risks
- Operational Risks
- Compliance Risks
- Post-Implementation Risks

9. CHANGE MANAGEMENT

Bidders must submit a detailed Change Management Plan which indicates how the whole Change Management Process will be handled. It must be noted that the MICT SETA does have an approved and adopted Change Management Process. At a minimum the Change Management Plan should include but not limited to the following:

- Change Planning & Strategy Development
- Stakeholder Engagement & Communication
- Training & User Enablement
- Process Mapping & Alignment
- Risk & Resistance Management
- Pilot Testing & Change Validation
- Go-Live Support & Performance Monitoring
- Continuous Improvement & Post-Implementation Review

10. TRANSITION PLAN

Bidders must submit a detailed transition plan which provides details on how that transition process from the current system to the new one, will be undertaken. The Transition Plan should at a minimum cover the following:

- Transition Planning & Strategy Development
- Data Migration & Validation
- System Configuration & Customization
- Testing & Quality Assurance
- Training & User Readiness
- Changeover & Go-Live Strategy
- Post-Go-Live Support & Stabilization
- Continuous Improvement & Optimization

11. COMPANY PROFILE

This Request for Proposal is open to consulting entities that have the following profile:

- 11.1 Competent and experienced resources with years providing similar services.
- 11.2 Service provider must demonstrate applicable local or international standards on providing the required services.

12. CONFIDENTIALITY TERMS AND CONDITIONS

- 12.1 The successful bidder will be bound to comply with MICT SETA confidentiality processes, including the non-disclosure agreement to ensure that it does not share any data / information gathered during the contract with any other person or entity without prior permission of MCT SETA. The data / information must not be used for any other purpose except for the originally intended.
- 12.2 The successful bidder will be subjected to compliance with the requirements of the POPI Act and the MICT SETA POPIA policies.
- 12.3 MICT SETA undertake to maintain confidentiality relating to any unpublished information supplied by the successful bidder as part of this Request for Proposal and will only use any information provided for the purposes of evaluating the proposal.

13. COSTING MODEL

The costing model provided below shall guide bidders on how their costing shall be indicated. This model is for illustration only. Bidders must include all products, software, hardware, and personnel required to services according to deliverables required for this project. The following factors must be considered when compiling pricing for this project:

- a) The solution objectives together with the scope of work should be considered when compiling the pricing for the delivery of the services.
- b) All costs must be projected inclusive of any applicable taxes and exchange rates.
- c) Costing must be done inclusive of any applicable travel or allowances of any kind and should therefore be inclusive of all foreseeable costs to achieve the project objectives.
- d) Pricing must be inclusive of all hardware, software, licensing and subscription, project management, training, and any applicable value-added services.
- e) Pricing must be indicative of all non-recurring (once-off) and recurring (monthly, quarterly, or annual) costs applicable to deliver the services.
- f) The project duration (Months = 54, Quarters = 18, Years = 4.6).
- g) The user base of MICT SETA.

14. PRICING SCHEDULE

Name of bidder: _____

Bid number: _____

Closing date: _____

Bid shall remain valid for acceptance for a period of **120 days** counted from the closing date.

Bidders to provide further cost breakdown where necessary under each line item, and sub-total and the overall RFB price (Total) should be included. The below table is for illustration only:

| ITEM # | DESCRIPTION OF SERVICES | UNIT COSTS (Each item) | FREQUENCY (Once-off, Monthly, Quarterly, Annually) | QTY | TOTAL COST |
|------------------|--|---------------------------|--|-----|------------|
| 1 | Subscription of Software and Licenses (once-off) | R | | | R |
| 2 | Subscription of Software and Licenses (Annual) | R | | | R |
| 3 | Implementation Cost | R | | | R |
| 4 | Project Management | R | | | R |
| 5 | Training and Skills Transfer | R | | | R |
| 6 | Support and Maintenance | R | | | R |
| Sub-Total | | | | | R |
| VAT @15% | | | | | R |
| Total | | | | | R |

NB: Bidders must submit this pricing schedule and related Annexure on a Separate envelope.

NB: The above model is for purposes of guiding bidders on how to structure their proposals. Bidders are required to provide detailed costing of the project on a pricing proposal that considers delivery of the project for the duration of the contract.

I/We, the undersigned, agree that this bidding price shall remain binding on me/us and open for acceptance for the period stipulated above.

Authorised Company Representative:

Capacity under which this quote is signed:

Signature:

Date:

15. EVALUATION CRITERIA

The MICT SETA complies with the provisions of the Public Finance Management Act, Act No 1 of 1999 as amended; Treasury Regulations of 2005; the Preferential Procurement Policy Framework Act, Act No 5 of 2000; and the Preferential Procurement Regulations of 2022; and the MICT SETA Supply Chain Management (SCM) Policy. All received bids proposals will be evaluated by following the bid evaluation processes to be staged as follows:

Stage 1 (A): Mandatory Criteria

Stage 1 (B): Functional Evaluation

Stage 1 (C): Presentation

Stage 2: Pricing and Specific Goals

15.1 Stage 1(A) – Mandatory Requirements

15.1.1. Compulsory Briefing session

The Briefing Session is a compulsory part of the acquisition process for all participating Service Providers. Non-attendance of thereof will automatically disqualify any prospective bidder.

Evidence required:

Signing of attendance Register of the compulsory virtual briefing session held on 24 February 2025.

15.1.2. Proof of Accreditation

The bidder must be an OEM/OSM or accredited or licensed to supply, implement and support the proposed ERP system.

Evidence required:

Bidder must provide proof that they are the OEM / OSM of the proposed ERP solution OR Bidder must submit valid OEM / OSM certificate(s) or letter(s) endorsed by the ERP solution OEM / OSM. Letters must be on company letterhead signed by an authorized representative of the OEM / OSM.

NOTE: BIDDERS THAT DO NOT MEET THE MANDATORY CRITERIA WILL BE ELIMINATED FROM FURTHER EVALUATION PROCESS.

15.2 STAGE 1(B): FUNCTIONAL/ TECHNICAL EVALUATION CRITERIA

Only bid submissions that have met the requirements of the set mandatory criteria will be considered for technical/ functionality evaluation. Bids submitted will be evaluated on technical/ functionality criteria out of a maximum of **85** points. A threshold of **75** out of the **100** points on technical/ functionality criteria and presentation has been set.

Note: All bidders achieving less than the set threshold will be declared non-responsive. Assessment of evaluation of the functional / technical criteria will be based on the table below:

| FUNCTIONAL / TECHNICAL CRITERIA WEIGHING | | |
|--|---|-------|
| Category | Description | Score |
| SOLUTION PROPOSAL | <p>The Bidder must submit a proposal for the required solution. The proposal must cover the minimum requirements for the proposed ERP solution as detailed in the bid:</p> <p>Functional Requirements</p> <ul style="list-style-type: none">○ Fixed Assets Module,○ HR Payroll and Employee Self-Service (ESS),○ The Bidder must submit a proposal for the required solution. The proposal must cover the minimum requirements for the proposed ERP solution as detailed in the bid:○ Human Resource Management (HRM), and○ Finance Business Units. <p>Non-Functional Requirements</p> <ul style="list-style-type: none">○ Integration,○ Master Data / General Ledger / General,○ Licensing, subscription, and IP rights,○ Hosting and Disaster Recovery,○ Data migration,○ Training and Skills Transfer,○ Support and Maintenance,○ Compliance and security, and○ Transition Plan <ul style="list-style-type: none">○ Bidder submitted a proposal that meets or exceeds all components of the requirements of the bid = 20 points○ Bidder submitted a proposal that does not meet all the requirements of the bid = 00 points○ Bidder did not submit a proposal for the bid = 00 points <p>NB: Non-compliance with the minimum requirements will be declared non-responsive.</p> | 20 |
| EXPERIENCE AND REFERENCES | <p>Experience & References:</p> <ul style="list-style-type: none">○ The bidder must submit proof of relevant experience in rendering ERP Services projects in the past ten (10) years. The experience required is for the supply, installation, configuration, support and maintenance of an ERP System of similar or larger sized organizations.○ Reference letters with contactable references for similar projects are required. The reference letters must be from Bidder's clients within the Republic of South Africa (RSA), must be on | 10 |

| | | |
|---------------------------------|---|-----------|
| | <p>company letterhead, signed by the Bidder's client and should indicate project implementation period. [10 points]</p> <ul style="list-style-type: none"> ○ Five (05) or more signed reference letters from different clients = 10 points ○ Four (04) signed reference letters from different clients = 08 points ○ Three (03) signed reference letters from different clients = 06 points ○ Two (02) signed reference letters from different clients = 04 points ○ One signed reference letter = 02 points ○ no signed reference letter(s) = 00 points <p>NOTE: The MICT SETA may verify the Reference Letters prior. Bidders with no track record of rendering similar services will be deemed non-responsive.</p> | |
| METHODOLOGY AND APPROACH | <p>Project Methodology and Approach</p> <ul style="list-style-type: none"> ○ Bidders are required to provide a detailed Project Implementation Methodology, approach, and Project Implementation Plan in executing the project and support services. ○ The methodology and approach should include all elements of the bid. ○ The Project Plan should clearly indicate the following (but not limited to) key processes: <ul style="list-style-type: none"> ○ Project team and resource allocation. ○ Project deliverables. ○ Project sub-activities; and ○ Project timelines. ● NB: all elements must be covered in detail. <p>Points for Project Implementation Methodology and Approach will be allocated as follows [10 points]:</p> <ul style="list-style-type: none"> ● Bid that has a detailed Project Implementation Methodology, approach in executing the project and support service that covers all four (4) elements as per above = 10 points ● Bid that has a detailed Project Implementation Methodology, approach in executing the project and support service that covers three (3) elements as per above = 07 points ● Bid that has a detailed Project Implementation Methodology, approach in executing the project and support service that covers two (2) elements as per above = 04 points ● Bid that has a detailed Project Implementation Methodology, approach in executing the project and support service that covers one element as per above = 02 points ● Bid that has a detailed Project Implementation Methodology, approach in executing the project and support service that covers none of the four (4) elements as per above = 0 points | 20 |

| | | |
|-----------------------------|---|-----------|
| | <p>Points for Project Implementation Plan will be allocated as follows:</p> <ul style="list-style-type: none"> • Bid that has a detailed Project Implementation Plan in executing the project and support service that covers all four (4) elements or more as per above = 10 points • and support service that covers only three (3) elements as per above = 07 points • Bid that has a detailed Project Implementation Plan in executing the project and support service that covers only two (2) elements as per above = 04 points • Bid that has a detailed Project Implementation Plan in executing the project and support service that covers one (1) element as per above = 02 points • Bid that has a detailed Project Implementation Plan in executing the project and support service that covers no element as per above = 0 points | |
| TRAINING PLAN | <p>Bidders are required to provide a detailed Training Plan that covers the training to be provided to relevant identified staff members. The training plan should clearly indicate the following:</p> <ul style="list-style-type: none"> • Handholding and on the job training to users of the system and internal technical resources. • User training to ensure that all users are at acceptable levels of performing their functions through the system. • Admin training for improved support. • Train the trainer and capacity building. • Provide user manuals (written and audio visual) of the system. <p>Points for the Training Plan will be allocated as follows:</p> <ul style="list-style-type: none"> • A detailed Training Plan that covers the above training elements of the bid = 05 points • A detailed Training Plan that covers some or none of elements of training of the bid = 0 points | 05 |
| RISK MANAGEMENT PLAN | <p>Bidders are required to provide a detailed Risk Management Plan that covers the risks prevalent with the implementation of a new ERP System, especially in an environment that is migrating from another ERP System. At a minimum the Risk Management Plan should include the mitigation the following risk but not limited to:</p> <ul style="list-style-type: none"> • Data Migration Risks • Business Process Misalignment • Change Management Risks • Technical Risks • Project Management Risks • Financial Risks • Operational Risks • Compliance Risks • Post-Implementation Risks <p>Points for the Risk Management Plan will be allocated as follows:</p> <ul style="list-style-type: none"> • A detailed Risk Management Plan that covers the above Risk Management elements of the bid = 05 points • A detailed Risk Management Plan that covers some or none of the Risk Management elements of the bid = 0 points | 05 |

| | | |
|-------------------------------|---|-----------|
| CHANGE MANAGEMENT PLAN | <p>Bidders must submit a detailed Change Management Plan which indicates how the whole Change Management Process will be handled. At a minimum the Change Management Plan should include but not limited to the following:</p> <ul style="list-style-type: none"> • Change Planning & Strategy Development • Stakeholder Engagement & Communication • Training & User Enablement • Process Mapping & Alignment • Risk & Resistance Management • Pilot Testing & Change Validation • Go-Live Support & Performance Monitoring • Continuous Improvement & Post-Implementation Review <p>Points for the Change Management Plan will be allocated as follows: A detailed Change Management Plan that covers the above Change Management elements of the bid = 05 points A detailed Change Management Plan that covers some or none of the Change Management elements of the bid = 0 points</p> | 05 |
| TRANSITION PLAN | <p>Bidders must submit a detailed transition plan which provides details on how that transition process from the current system to the new one, will be undertaken. The Transition Plan should at a minimum cover the following:</p> <ul style="list-style-type: none"> • Transition Planning & Strategy Development • Data Migration & Validation • System Configuration & Customization • Testing & Quality Assurance • Training & User Readiness • Changeover & Go-Live Strategy • Post-Go-Live Support & Stabilization • Continuous Improvement & Optimization <p>Points for the Transition Plan will be allocated as follows: A detailed Transition Plan that covers the above Transition elements of the bid = 10 points A detailed Transition Plan that covers some or none of the Transition elements of the bid = 0 points</p> | 10 |
| PROJECT TEAM | <p>CVs of key Project Team members to be attached, specifically for the Project Manager and Technical Lead: [10 points].</p> <p>Project Manager (certified with PMP / Prince 2, or other equivalent Project Management certification). Relevant experience of Project Manager in Managing similar projects. Profile or CV should clearly indicate the projects, and names of clients: [05 points].</p> <ul style="list-style-type: none"> • Five (05) years and above = 05 points • Two (02) to four (04) years = 03 points • Less than two (02) years = 01 points <p>Technical Lead (must have a qualification from the OEM of the ERP solution proposed). Relevant experience and strong background in both Technology and ERP solutions. Profile or CV should clearly indicate the projects, and names of clients: [05 points].</p> | 10 |

| | | |
|---|---|------------|
| | <ul style="list-style-type: none"> • Five (05) years and above = 05 points • Two (02) to four (04) years = 03 points • Less than two (02) years = 01 point <p>Note: the projects in this factor refer to those delivered by the project team in any current or past company, not limited to the bidding company, i.e., linked to the individual.</p> <p>Bidders with no project competent team members will fail risk analysis on their capacity to deliver on the project and will therefore be deemed non-responsive.</p> | |
| Minimum threshold to proceed to presentation stage | | 65 |
| Technical Evaluation Criteria Total | | 85 |
| Presentation Total | | 15 |
| Total Bid Total | | 100 |

NOTE: BIDDERS THAT MEET THE MINIMUM THRESHOLD OF 65 WILL BE INVITED FOR PRESENTATIONS.

NOTE: BIDDERS THAT DO NOT MEET THE MINIMUM THRESHOLD 65/85 POINTS ON FUNCTIONAL CRITERIA WILL NOT BE INVITED FOR PRESENTATIONS.

NOTE: BIDDERS THAT MEET THE FUNCTIONAL CRITERIA MINIMUM THRESHOLD WILL BE INVITED FOR PRESENTATIONS OF THE PROPOSED SOLUTION, AS PER THE REQUIREMENTS OUTLINED IN THE BID DOCUMENT. THE RESULTS OF THE PRESENTATIONS WILL BE USED TO DETERMINE THE SUITABILITY OF THE PROPOSED SOLUTION AND THE COMPETENCY OF THE POTENTIAL SERVICE PROVIDER.

15.3. STAGE 1(C): PRESENTATION EVALUATION

Only bidders that have met the set minimum threshold of **65** points on technical/ functionality evaluation will be considered for presentation evaluation. Presentation evaluation will be scored out of a maximum of **15 points**. A threshold of **10** out of the **15 points** has been set.

Note: All bidders achieving less than the set threshold will be declared non-responsive. Assessment of evaluation of the presentation will be based on the table below:

| PRESENTATION ON SOLUTION FUNCTIONS | Maximum Points |
|---|-----------------------|
| Functional Fit | 03 Points |
| Technical Feasibility | 03 Points |
| Total Cost of Ownership | 03 Points |
| Vendor Experience and Capability | 03 Points |
| User Experience | 03 Points |
| Minimum Score | 10 |
| Total Score | 15 |

Bidders must meet a minimum threshold of 10/15 points on presentations evaluation in order for the proposed solution to be considered suitably. Bidders need to score a minimum of 75 points,

combination of functional evaluation criteria and presentation points, to proceed to the next stage of the evaluation process.

15.4 STAGE 2: PRICE AND SPECIFIC GOALS

Only bid submissions that have met the requirements of the set functional/ technical evaluation criteria will be considered for evaluation on price and specific goals. Evaluation of Price and Specific Goals according to the 80/20 preference point system in terms of the Preferential Procurement Regulations 2022, where 80 points will be for Price and 20 points will be for Specific Goals.

Specific Goal to be evaluated out of **20 Points**:

| Special Goal Criteria | Points |
|---|---------------|
| Enterprise which is at least 51% owned by historically disadvantaged persons. | 10 |
| Enterprise which is at least 51% owned by historically disadvantaged women. | 05 |
| Enterprise which is at least 51% owned by historically disadvantaged youth. | 05 |
| Total | 20 |

**** Enterprises that are not owned by historically disadvantaged persons will be allocated 0 points.**

Bidder must submit the following documents:

- Certified ID copies of the company's directors as per the CIPC documents. (Certified copies must not be older than six (06) months).
- CIPC Documents and/or share certificate (for companies with more than one (01) Director).

Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

1.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

PREFERENCE PROCUREMENT CLAIM FORM

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1 GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) the **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

| | POINTS |
|--|------------|
| PRICE | 80 |
| SPECIFIC GOALS | 20 |
| Total points for Price and SPECIFIC GOALS | 100 |

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2 DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

| | | | |
|---|-----------|---|--|
| 80/20 | or | 90/10 | |
| $Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$ | or | $Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$ | |

Where

Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

| | | |
|--------------|-----------|--------------|
| 80/20 | or | 90/10 |
|--------------|-----------|--------------|

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \quad \text{or} \quad Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$$

Where

Ps = Points scored for price of tender under consideration
 Pt = Price of tender under consideration
 Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of--

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.
Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

| 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) |
|---|--|--|
| Enterprises which are at least 51% owned by historically disadvantaged persons. | 10 | |
| Enterprises which are at least 51% owned by historically disadvantaged women. | 05 | |
| Enterprises which are at least 51% owned by historically disadvantaged youth. | 05 | |

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....