,

 Private Bag X193, PRETORIA, 0001, Forum Building, Cnr Struben and Bosman Streets, Pretoria

**TERMS OF REFERENCE**

**FOR THE PROCUREMENT OF HYPERCONVERGED INFRASTRUCTURE AND IMPLEMENTATION SERVICES**

2021

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# INTRODUCTION

# 1.1 The Purpose

The purpose of this document is to appoint a service provider who will supply, configure and migrate data from current server infrastructure for the Department of Transport. The service providers will be called upon to provide proposals to supply, configure and migrate data into hyperconverged infrastructure.

# 1.2 The Client

The Client is the Department of Transport (DoT); the Project Sponsor is the Chief Information Officer and Director: ICT Infrastructure. Server Administration / LAN Desktop Support will serve as the Project Managers.

# 2. THE BACKGROUND

2.1 The Directorate ICT Infrastructure is tasked with the responsibility of the management of data centres and hosting services to DoT staff. Currently, the DoT utilises aging blade server infrastructure and requires a service provider to supply, configure and migrate data into hyperconverged infrastructure. The department also, where necessary, contracts the services of external IT service providers to conduct specialized IT assignments on its behalf.

Table 1: Current install base (Head office)

| **DOT – Production Environment** | **Qty** |
| --- | --- |
| **Hardware Components** |
| VNX5300 Storage Subsystem with approximately 40TB usable capacity | 1 |
| Unity 300 Storage Subsystem with approximately 57,3TB usable capacity | 1 |
| DS6610B Fibre Channel Switches, with 16 ports each | 2 |
| M1000e Blade Chassis with the following blades:1. PowerEdge M610
2. PowerEdge M620
3. PowerEdge M630
 | 1235 |
| **Software Components** |
| VMware vCenter Standard | 1 |
| VMware vSphere 7 Enterprise Plus for 1 Processor | 26 |
| VMware vRealize Operations 8 – Standard (Per CPU) | 24 |

Table 2: Current Install base - SITA Centurion

| **DOT – SITA Centurion** | **Qty** |
| --- | --- |
| **Hardware Components** |
| VNX5300 Storage Subsystem with approximately 40TB usable capacity | 1 |
| DS6610B Fibre Channel Switches, with 16 ports each | 2 |
| M1000e Blade Chassis with the following blades:1. PowerEdge M610
2. PowerEdge M620
 | 123 |
| **Software Components** |
| VMware vCenter Standard (1 x Production, and 1 x DR) | 1 |

2.2 The Sub Directorate specialises in support of DoT applications and databases hosting. Internally, there is a need to replace the current aging server blade infrastructure, hence a need to appoint experienced service provider(s).

 **3. THE GOALS & OBJECTIVES**

3.1 The primary goal of the sub Directorate Server Administration is to provide the following:

* Monitor server operations daily. Maintenance of the servers operating systems (virtually), including access and security control.
* Implement disaster recovery planning and procedures including system file backups.
* Manage and troubleshoot server issues and ensure maintenance, upgrades, installation of patches, fixes to all servers.
* Coordinate with vendors and external contractors and ensure effective completion of all installation hardware at various data centres.
* Ensure Storage Area Network (SAN) and disk array of hardware are in good state.
* Assist to ensure that backup and replication of data is sent offsite to cater for disastrous situations.
* Monitor and manage the storage (SAN).

The aim of this Terms of Reference is to serve as the basis which will be relied on during the identification of service provider(s).

# 4. SCOPE OF WORK

4.1. The scope of work to be covered shall be as follows:

* + 1. Supply, configure and migrate data to hyperconverged infrastructure from Dell server blade infrastructure in use at the following areas (Two (2) deployments – DoT Head Office – Pretoria and one (1) deployment – Disaster recovery site – Centurion on VMware virtualisation environment;
		2. Supply and configuration of 42U rack with LCD, and PDUs
		3. VMware virtualisation software - vSAN;
		4. vCenter enhanced linked mode between Head office and DR site;
		5. Provision of HCI nodes that adds up to 100 Tb usable on each site;
		6. HCI (HO and DR) Components on each site

|  |  |
| --- | --- |
| **HCI – Production (7 x Nodes) - Pretoria** | **Qty** |
| **Hardware Components** |
| HCI Nodes each with the following configuration |  |
| Compute Platform Motherboard | 1 |
| Intel Xeon Silver 4216 2.1G, 16C/32T, 9.6GT/s, 22M Cache, Turbo, HT (100W) DDR4-2400 | 2 |
| Remote Hardware Management capability  | 1 |
| Chassis with up to 24 x 2.5 Hard Drives including 4 NVMe Drives | 1 |
| 3200MT/s RDIMMs | 1 |
| 32GB RDIMM, 3200MT/s, Dual Rank | 8 |
| Redundant Internal SD Card Reader | 1 |
| 64GB microSDHC/SDXC Card | 2 |
| 800GB SSD SAS Mix Use 12Gbps 512e 2.5in Hot-plug AG Drive, 3 DWPD, 4380 TBW (RAID5) | 3 |
| 3.84TB SSD SATA Read Intensive 6Gbps 512 2.5in Hot-plug AG Drive, 1 DWPD, 7008 TBW (RAID5) | 9 |
| 2 x M.2 Sticks 240G (RAID 1) | 1 |
| 12Gbps SAS Controller Adapter, Low Profile | 1 |
| Standard 1U Heatsink | 2 |
| Dual, Hot-plug, Redundant Power Supply (1+1), 1600W, 250 Volt Power Cord Required for Use | 1 |
| South African Spare Power Cord 220V | 2 |
| Trusted Platform Module 2.0 | 1 |
| Network interface card - Dual Port 10/25GbE SFP28 with SFP+ SX module | 2 |
| 5 Years 24/7 Production support with 4-hour call-out | 1 |
| Rack Sliding Rails with Cable Management Arm | 1 |
| **Software** |
| HCI Software Factory Installed | 1 |
| HCI VMware, vSAN Advanced | 2 |
| HCI System Management Software | 1 |
| 5 Years 24/7 Production support with 4-hour call-out | 1 |
| **Support** |
| 24/7 Production support Onsite Service VSAN Advanced Initial, 60 Month(s) | 1 |

DR Components

|  |  |
| --- | --- |
| **HCI – Production (7 x Nodes) - Centurion** | **Qty** |
| **Hardware Components** |
| HCI Nodes each with the following configuration |  |
| Compute Platform Motherboard | 1 |
| Intel Xeon Silver 4216 2.1G, 16C/32T, 9.6GT/s, 22M Cache, Turbo, HT (100W) DDR4-2400 | 2 |
| Remote Hardware Management capability  | 1 |
| Chassis with up to 24 x 2.5 Hard Drives including 4 NVMe Drives | 1 |
| 3200MT/s RDIMMs | 1 |
| 32GB RDIMM, 3200MT/s, Dual Rank | 8 |
| Redundant Internal SD Card Reader | 1 |
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| 800GB SSD SAS Mix Use 12Gbps 512e 2.5in Hot-plug AG Drive, 3 DWPD, 4380 TBW (RAID5) | 3 |
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| 2 x M.2 Sticks 240G (RAID 1) | 1 |
| 12Gbps SAS Controller Adapter, Low Profile | 1 |
| Standard 1U Heatsink | 2 |
| Dual, Hot-plug, Redundant Power Supply (1+1), 1600W, 250 Volt Power Cord Required for Use | 1 |
| South African Spare Power Cord 220V | 2 |
| Trusted Platform Module 2.0 | 1 |
| Network interface card - Dual Port 10/25GbE SFP28 with SFP+ SX module | 2 |
| 5 Years 24/7 Production support with 4-hour call-out | 1 |
| Rack Sliding Rails with Cable Management Arm | 1 |
| **Software** |
| HCI Software Factory Installed | 1 |
| HCI VMware, vSAN Advanced | 2 |
| HCI System Management Software | 1 |
| 5 Years 24/7 Production support with 4-hour call-out | 1 |
| **Support** |
| 24/7 Production support Onsite Service VSAN Advanced Initial, 60 Month(s) | 1 |

* + 1. Rack switches on both sites (HO & DR)

The TOR switches will be for Production - **Pretoria** and DR - **Centurion** Sites (2 each)

|  |  |
| --- | --- |
| **TOR Switches** | **Qty** |
| **TOR Network Switches, 24 ports x 25GbE, 2 x 100GbE QSFP+, each with the following configuration** | 4 |
| **Components** |
| Networking, Transceiver, SFP+, 10GbE, SR, 850nm Wavelength, 300m Reach | 4 |
| Networking, Transceiver, SFP+, 1GbE, SR, 850nm Wavelength, 300m Reach | 4 |
| Rack Power Cord 2M, C13/C14, 12A | 2 |
| Networking, Cable, SFP28 to SFP28, 25GbE, Passive Copper Twinax Direct Attach Cable, 2.5 Meter | 16 |
| Networking Cable, 100GbE QSFP28 to QSFP28, Passive Copper Direct Attach Cable, 0.5 Meter | 1 |
| OM4 Multi-mode 10 meters – LC-LC cables | 6 |
| Hot-swappable Redundant power-supplies | 2 |
| **Support** |
| 5Yr 24/7 Production Support On-Site Service | 1 |
| **Cables** |
| Patch Cable - patch cable - 5 m  | 16 |

* + 1. Management switches (HO & DR)

The Management switches will be for Production - Pretoria and DR Sites - Centurion (1 each)

|  |  |
| --- | --- |
| **Management Networking Switches** | **Qty** |
| **Networking 48 ports x 1000Base-T, 2 ports x 10GbE, each with the following** | 2 |
| **Components** |
| Networking, Transceiver, SFP+, 10GbE, SR, 850nm Wavelength, 300m Reach | 2 |
| Rack Power Cord 2M, C13/C14, 12A | 2 |
| Power Supply, 200w, IO to PSU airflow | 1 |
| **Support** |
| 5Yr 24/7 Production Support Onsite Service | 1 |

* + 1. Additional software requirements

**Ad**

|  |  |
| --- | --- |
| **Additional VMware vSphere Enterprise Plus Licenses** | **Qty** |
| **Components**  |  |
| VMware vCenter Server 7 Standard for vSphere 7  | 1 |
| **Support** |  |
| ProSupport for Software VMware vCenter Server 7 Standard for vSphere 7, 5 years | 1 |

**Note: Existing VMware Licenses are already in place. ditional VMware vSphere Enterprise Plus Licenses**

* + 1. Full project management;
		2. Site preparation, project planning deployment, troubleshooting, migration and performance optimisation (See Table below)

Table 3: Implementation services for production - Pretoria and DR – Centurion sites

| **Implementation Services for Production - Pretoria and DR - Centurion Sites** |
| --- |
| **Component** | **Details** |
| Project Management | * Initiate
* Plan
* Execute
* Close
 |
| Documentation and Planning | * Planning Workshops
* Work Breakdown Structure
* Power-On and Power-Off Operational Documentation
* Migration Planning
* Migration Activity Sequence Plans
* As-Built Configuration Document
* Cable Plugging Instructions
* UAT Test planning
* UAT Acceptance Documentation
 |
| Implementation and Configuration | * Site Readiness Review
* Equipment Delivery
* Rack and Stack Hardware
* Verify Firmware and BIOS levels
* Cable Plugging
* Network Configuration
* HCI System Configuration
 |
| Migration | * Migration of Data from two (2) VNX5300 and one (1) Unity 300 to HCI platform
* Migration of VM’s
 |
| Network Configuration | * Rack switches integration with core Network
* VLAN configuration
 |
| Disaster Recovery | * Re-instate Replication
* Perform DR-Test
 |

* + 1. Training credits for vSphere Foundation and VCP-DCV certified professional exams for four (4) resources.
		2. Formal training credits for four (4) resources on the following:
	+ HCI Infrastructure.
	+ VMware vSphere: Install, Configure and Manage.

# DELIVERABLES

5.1. The successful bidder must be able to supply, deploy and migrate data from current server blade infrastructure as per 4.1 above, in line with the OEM’s preferred architecture and best practice.

5.2. Once allocated an assignment and having understood the mandate, the successful bidder will be expected to submit to the client, project plan indicating approach to the review and resource allocation, amongst others.

5.3. The successful bidder may be requested to submit progress report (either verbally or in writing) to the client.

5.4. Before issuing the final HCI deployment and configuration report, the successful bidder shall provide the DOT with draft HCI deployment and configuration report for possible discussion and inputs.

5.5. Upon conclusion of the HCI deliver, implementation and migration services, it shall be incumbent upon the successful bidder to furnish to the client with configuration documentation of the whole hardware system (architecture).

5.6. The successful bidder shall provide a detailed skill transfer plan.

# 6. SKILLS REQUIREMENTS

6.1 The service providers must have relevant experience and skills in the areas of HCI server hardware deployments.

6.2 The bidders are required to submit detailed CV’s of the resources (project team members) depicting the overall skills and/or expertise profile of the personnel to work on the project. The skills and knowledge required includes but are not limited to:

* + 1. Qualification(s) in Information Technology, including previous engagements of HCI installations. Bidders who do not submit (at least 1 HCI certified resource) certified qualifications and detailed CV’s will be disqualified.
		2. OEM letter certifying that the bidder is HCI implementation services company and must be either platinum or titanium partner.
		3. The supplier must provide three (3) reference letters of similar work done. The letter must be either on the customer letterhead or certified sworn affidavit.
		4. The suppliers must be on the SITA RFB 2003. Bidder to supply proof.

**7. DURATION AND ALLOCATION OF WORK**

7.1 The duration of supply, implementation and migration of data will depend on the nature and complexity of requirements and dependencies. However, it is expected that, the project shall commence within two (2) weeks of delivery of the Hyperconverged infrastructure by the successful bidder.

7.2 The Project completion entails having had all the stipulated deliverables above being met; possibly earlier but not later than two months, unless agreed to by DOT and successful bidder. The final timeframe will be agreed upon in the inception meeting, and will both include a migration for period not exceeding six months.

7.3 It is expected the migration of data would happen after-hours (including the weekends) to minimise disruptions.

**8. REMUNERATION / PAYMENT REGIME**

8.1 Payments for expenditure accrued pertaining to the project shall be processed and paid over only at the completion and approval of the project milestones (milestone that would have been approved by DOT, as per the project plan agreed upon. The first payment would be for the delivery of required infrastructure and the implementation and migration would be the last payment schedule.

# 9. VARIATION CONDITIONS & POOR PERFORMANCE PENALTIES

# 9.1 Project Duration

9.1.1 The project duration is fixed to the conditions stipulated in paragraph 7 above.

9.1.2 The provisions of the General Conditions of Contract together with deliverables and scope of work shall apply and all terms and conditions therein must be fully complied with.

# 9.2 Cost / Expenditure

The Total budget agreed in the contract will not be extended other than on circumstances that can be reasonably proven not to be caused by poor planning by the successful bidder.

# 9.3 Performance / Quality

 The quality of the deliverables must meet and/or surpass all the stated goals and objectives stipulated in paragraph 3 above.

# 9.4 Penalty Regime

9.4.1 Poor performance will result in penalties that include withholding of a minimum 30% of the total invoice of each affected phase / milestone until it is fixed before the final product is submitted. In the case where the performance has not been improved to the satisfaction of the Department and the final product is handed over, the original amount held back will not be paid over to the Service Provider under any circumstances. On the other hand, an improved quality and/or performance, at the satisfaction of the Department, will require the outstanding part of the held back invoice to be paid to the Service Provider in full but with no additional interest.

9.4.2 The project milestones / phases are expected to be adhered to. Any deviation must be approved by the Department prior to any commencement of the changes. Failure to do so will result in a 5% non-payment of that particular and/or affected phase(s).

9.4.3 Notwithstanding item 9.4.2 above, failure to meet the deadline as stipulated in item 8 will result in 30% of the total outstanding payments for the project as whole not being paid over to the Service Provider if the poor performance is attributed to the Service Provider unless there is undisputed evidence that the fault lies with the Department.

#  10. MANDATORY REQUIREMENTS

**Bidders must comply with the requirements and submit all required document(s) indicated hereunder with the bid documents at the closing date and time of bid. This phase is not scored and bidders who fail to comply with all the mandatory criteria will be disqualified**.

**10.1** Bidders are required to be registered on the Central Supplier Database and the Department of Transport shall verify the bidder’s tax compliance status through the Central Supplier Database.

**10.2** Where Consortia / Joint Ventures / Sub-contractors 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. It is therefore a condition of this Bid that the tax matters of the bidder be in order at any point in time from the closing date of the Bid.

**10.3** This Bid will only be awarded to a bidder(s) whose tax status on Central Supplier Database is compliant. Compliance should remain valid for the duration of the contract.

**10.4 Checklist**

The following is the mandatory requirements and will lead to disqualification

| **Hyperconverged Solution**  | **Comply** | **Do not Comply** |
| --- | --- | --- |
| * The solution must have future proof of seamlessly communicating with these cloud providers (Microsoft Azure Cloud and AWS) to allow multi-cloud and hybrid cloud
* This is a key deciding factor as the Department of Transport (DOT) is currently defining it's journey to the cloud and requires a solution that's ready to achieve cloud interoperability.
 |  |  |
| * The Hyper-Converged Software must be based on proven virtualisation technology leveraging for both software defined compute and storage.
 |  |  |
| * Seamless integration with off-the-shelf Hypervisor eco-system management solutions assuring streamlined deployment and provisioning in virtual environments
 |  |  |
| * The appliance must deliver resiliency, QoS, and centralised management functionality
 |  |  |
| * One-click non-disruptive patches and upgrades, covering hardware related updates as well as software related updates, in a single fully automated/orchestrated process.
 |  |  |
| * The solution must be able to add new appliances to join an existing cluster. Up to 64 nodes in a single cluster. Solution should also allow growth and scale for compute and storage resources separately when needed.
 |  |  |
| * The appliance must automatically discover and non-disruptively, adds each new node or appliance and rebalances resources and workloads across the cluster.
 |  |  |
| * The proposed appliance must combine virtualisation, compute, storage, management, and data protection with a single point of support for the hardware and software.
 |  |  |
| * The solution must have a user-friendly system management and operations dashboard that provides a simple user interface, online chat, web-based service and support, and comprehensive forum knowledgebase.
 |  |  |
| * The solution must have a vCenter HTML5 plugin to manage the hardware and software lifecycle within vCenter.
 |  |  |
| * The HCI Cluster switches must support automatic detection of the HCI nodes, and automatic network fabric creation for the cluster.
 |  |  |
| * The solution MUST NOT run any sort of software layered on top of hypervisor (Hypervisor emulation is not acceptable).
 |  |  |
| * The solution must be based on industry standard component and must not use any kind of proprietary component (PCIe card nor legacy network fabric)
 |  |  |
| * Proactive two-way remote support connection that is secure, high speed, and operates 24x7x365
 |  |  |
| * Manufacturer’s deployment services up to Hypervisor level should be included.
 |  |  |
| * The solution must support continuous data protection (CDP) replication on a per VM basis.
	+ The solution must support vCenter integration
	+ Replication required for 70 VM’s
	+ The main objective of CDP is to protect against Ransomware
 |  |  |
| * Training Credits for 4 resources:
	+ HCI Infrastructure
	+ VMware vSphere: Install, Configure and Manage
 |  |  |
| * Certification Credits for 4 resources:
	+ vSphere Foundation (1 exam per resource)
	+ VCP-DCV: VMware Certified Professional – Data Center Virtualisation (1 exam per resource)
 |  |  |

#  BID EVALUATION CRITERIA

**11.1** Bidders are invited and, in fact, encouraged to attend a briefing session to be held virtually, where they can ask for clarification on the evaluation criteria and other aspects of the Bid. As this briefing session will be done virtually, it will not be compulsory. The link will be advertised during the bid advert.

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**11.2** Only bidders who have complied with mandatory requirements will be evaluated for functionality.

**11.3** Bidders must submit supportive documentation for all functional requirements as indicated hereunder as part of their bid documents.

**11.4** The Bid Evaluation Committee (BEC) responsible for scoring the respective bids will evaluate and score all bids based on their submissions and the information provided.

**11.5** The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These marks will be added and expressed as a fraction of the best possible score for all criteria.

**11.6** Functionality will be evaluated based on the supporting documentation supplied by the bidders in accordance with the functionality criteria and values below.

**11.7** Bidders are requested to ensure they become familiar with Table 2 and 3 below. Sufficient supporting information should be provided in your Bid Proposal. Bidders are especially requested to propose details on capacity building on how skills transfer will be incorporated throughout the phases of the project.

**11.8** The evaluation of the functionality will be evaluated individually by Members of Bid Evaluation Committee in accordance with the below functionality criteria and values. The applicable values that will be utilized when scoring each criterion ranges from:

**1 = Poor,**

**2 = Average**

**3 = Good**

**4 = Very Good**

**5 = Excellent**

# 11.9 Stage 1: Functionality

Table 4: Summary of evaluation criteria

|  |  |  |
| --- | --- | --- |
| **EVALUATION CRITERIA** | **GUIDELINES FOR CRITERIA APPLICATION** | **WEIGHT** |
| **ABILITY AND CAPABILITY** | **Company and/or JV experience:** Experience of the firm and JV Partners for the required services. (Reference letters under the client-company letterhead/certified sworn affidavits, with contactable details that confirms that the firm is successfully managing or has previously managed projects of a similar nature must be attached). The reference letter must state, the scope of work, the duration and if the project was completed successfully. | **30** |
| **METHODOLOGY** | Bidders should provide a comprehensive project execution plan covering the entire scope of work, including a support plan with clear deliverables and timeframes for each task to be completed and the resources (persons) assigned to the tasks. | **10** |
| **DEMONSTRATED KNOWLEDGE, SKILLS AND COMPETENCY IN THE SPECIFIED AREAS BY TEAM MEMBERS** | **Composition of the Team and confirmation that the Team members have demonstrated skills and competency in the required areas for this project:** Bidders must provide CVs with certified copies of qualifications and certificates of each project team members to indicate area of expertise. | **40** |
| **TRAINING, SKILLS DEVELOPMENT PLAN AND TRANSFER OF SKILLS** | A skills transfer plan indicating the kind of training interventions to be provided for the identified DOT employees that are relevant to the scope of this project. | **20** |

Table 5: Ability and capability

|  |  |  |  |
| --- | --- | --- | --- |
| **Scoring Criteria:**  | **Guidelines for Criteria Application** | **Points allocation for sub-criteria**  | **Weighting factor**  |
| Experience of the firm or consortium (JV partners) for the required services. Reference letter under the client-company letterhead, with contactable details that confirms that the firm is successfully managing or has previously managed projects of a similar nature must be attached. The reference letter must state the scope of works, the project value, the project duration and if the project was completed successfully. | 1. Three or more completion reference letters provided on client’s letterheads (successfully completed projects) or sworn affidavits from the client.
 |  = 5 points  | **30 %** |
| 1. Two completion reference letters provided on client’s letterheads (successfully completed projects) or sworn affidavits from the client.
 |  = 3 points  |
| 1. One completion reference letter provided on client’s letterheads (successfully completed projects) or sworn affidavits from the client.
 |  = 1 point  |

Table 6: Methodology

| **Scoring Criteria:**  | **Guidelines for Criteria Application** | **Points allocation for sub-criteria**  | **Weighting factor**  |
| --- | --- | --- | --- |
| Detailed proposed methodology of how the project will be executed that covers the entire project scope of work, the proposed work schedule, the proposed systems to be used, the proposed resource allocation and the proposed timeframes.Evidence is provided that the firm or consortium (JV partners) will be able to provide the required services throughout the country i.e. the organisation should provide its details of resource allocation and regional offices to demonstrate its “national footprint” to successfully perform its functions / fulfil its responsibilities | 1. Comprehensive proposal with a project execution plan covering the entire scope of work including timeframes, key tasks, sub tasks, distribution of resources, with project duration and clear completion date. This response far exceeds the minimum requirements of the project brief and the offering is an important “value add” to the DoT. The proposal is realistic and achievable.
 |  = 5 points  | **10 %** |
| 1. Comprehensive proposal with a project execution plan covering the entire scope of work including timeframes, key tasks, sub tasks, distribution of resources, with project duration and clear completion date. This response exceeds the minimum requirements of the project brief.
 |  = 4 points  |
| 1. Comprehensive proposal project execution plan covering the entire scope of work including a support plan with clear deliverables and timeframes for each task to be completed and the resources (persons) assigned to the tasks.
 |  = 3 points  |
| 1. This proposal is not comprehensive and the project plan is not fully responding to the project brief.
 |  = 2 points  |
| 1. This proposal is not comprehensive and the project plan is not responsive or very poorly responsive to the project brief.
 |  = 1 point  |

Table 7: Experience and Composition of Project Team

| **Scoring Criteria:**  | **Guidelines for Criteria Application** | **Points allocation for sub-criteria**  | **Weighting factor (40%)** |
| --- | --- | --- | --- |
| **3)****Composition of the Team and confirmation that the Team members have demonstrated skills and competency in the required areas for this project:** Bidders must provide CVs with copies of qualifications and certificates of each project team member to indicate area of expertise. (also refer Annexure C) | 1. Individual Technical Team members are subject matter experts on HCI, VMware and SAN Implementation and maintenance projects. Team members need to have experience in the preparation of technical documentation (operational, cabling, reports & presentations).

The skill sets needed are: HCI Implementation, Design and Administration. | **Average Individual / Team Member years of work experience:*** 5 - 6 years = 1 point
* 7 - 8 years = 2 points
* 9 - 10 years = 3 points
* 11 - 12 years = 4 points
* More the 12 years = 5 points
 | **15 %** |
| 1. Overall Technical Competency of the Project Leader, who must have an IT qualification and HCI certification and have the necessary / appropriate work experience and managing teams on similar projects.
 | **IT Qualification and number of years work experience:*** 1 - 2 years = 1 point
* 2 - 3 years = 2 points
* 3 - 4 years = 3 points
* 4 - 5 years = 4 points

More the 6 years = 5 points **Without formal IT qualification and have number of years’ experience:*** 6 - 7 years = 1 point
* 7 - 8 years = 2 points
* 8 - 9 years = 3 points
* 9 - 10 years = 4 points
* More than 11 years= 5 points

**Experience in managing teams on similar projects (in value and scope)** * Under 2 year = 1 point
* 2 - 3 years = 2 points
* 4 – 5 years = 3 points
* 6 - 7 years = 4 points
* More than 7 years= 5 points
 | **10 %** |
| 1. Project Team members need to have a combination of Project Management skills, Data migration skills - (including the ability to review technical documents) experience.
 | **Average Individual / Team Member years of relevant work experience as per the CV and linking to Table 1:*** 0 - 2 years = 1 point
* 3 - 4 years = 2 points
* 5 - 6 years = 3 points
* 7 - 8 years = 4 points
* More than 9 years = 5 points
 | **15 %** |

Table 8: Skills Transfer

| **Scoring Criteria:**  | **Guidelines for Criteria Application** | **Points allocation for sub-criteria**  | **Weighting factor**  |
| --- | --- | --- | --- |
| A skills transfer plan indicating the kind of training interventions to be provided for the identified DOT employees that are relevant to the scope of this project. | 1. Training and skills plan covering all aspects rate-3&4. The plans beyond the scope of this project and these beneficial skills transfer (formal and informal training).
 |  = 5 points  | **20 %** |
| 1. Training and skills plan covering all aspects under rate-3 and beyond.
 |  = 4 points  |
| 1. Realistic Training and Skills Development Plan covering all aspects, with regards to the skills relevant to the scope of this project.
 |  = 3 points  |
| 1. Plan has been submitted not covering all aspects, with regards the skills relevant to the scope of this project.
 |  = 2 points  |
| 1. No plan at all or irrelevant details has been submitted in the response
 |  = 1 point  |

**11.10** The Bids that fail to achieve a minimum of 75 points out of 100 points for functionality will be disqualified. This means that such bids will not be evaluated on the Preference Points System stage.

**11.11 Stage Two – Evaluation in terms of 80/20 Preference Points System**

 Only bids that achieve the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 preference points system.

**11.11.1 Detailed Pricing:**

Service Providers must complete the required SBD Pricing documents and ensure that Prices are:

* 1. Firm and inclusive of all costs, including disbursements;
	2. inclusive of VAT, if applicable;
	3. Correctly calculated and identical to the financial proposal;
	4. Pricing should be detailed, with proper cost breakdown, in line with milestones.
	5. The Department uses a two-envelope system.

It is recommended that a pricing schedule be used as per below table

| **Component** | **Details** | **Pricing** |
| --- | --- | --- |
| Project Management | * Initiate
* Plan
* Execute
* Close
 |  |
| Documentation and Planning | * Planning Workshops
* Work Breakdown Structure
* Power-On and Power-Off Operational Documentation
* Migration Planning
* Migration Activity Sequence Plans
* As-Built Configuration Document
* Cable Plugging Instructions
* UAT Test planning
* UAT Acceptance Documentation
 |  |
| Implementation and Configuration | * Site Readiness Review
* Equipment Delivery
* Rack and Stack Hardware
* Verify Firmware and BIOS levels
* Cable Plugging
* Network Configuration
* HCI System Configuration
 |  |
| Migration | * Migration of Data from two (2) VNX5300 and one (1) Unity 300 to HCI platform
* Migration of VM’s
* Software upgrade
 |  |
| Network Configuration | * Rack switches integration with core Network
* VLAN configuration
 |  |
| Disaster Recovery | * Re-instate Replication
* Perform DR-Test
 |  |
| HCI hardware | * As detailed in Table 4.16 – 4.18
 |  |
| Licenses | * As detailed in Table 4.19
 |  |
| Training | Formal training credits for four (4) resources on the following:* + HCI Infrastructure.
	+ VMware vSphere: Install, Configure and Manage.

Four (4) vSphere Foundation and VCP-DCV certified professional exams vouchers. |  |

**NO PRICES MUST REFLECT IN THE TECHNICAL PROPOSAL.**

**11.11.2** **Fees:**

Domestic hotel accommodation may not exceed the maximum allowable rates referred to in the domestic accommodation rate grid set out in National Treasury Cost Containment Directives. (including dinner, breakfast and parking), air travel must be restricted to economy class and claims per kilometre may not exceed the rates approved by the Automobile Association of South Africa.

**11.11.3** **Rates:**

According to the 23 October 2013 Cabinet Resolution as defined in the National Treasury Instruction 01 of 2013/14: Cost Containment Measures sub-paragraph 4.2; the Consultants (or Service Provider) will only be remunerated on the following rates regime:

* 1. The “Guidelines for fees” issued by the South African Institute of Chartered Accountants (SAICA);
	2. The “Guide on Hourly Fee Rates for Consultants”, by the Department of Public Service and Administration (DPSA); or
	3. Based on the body regulating the profession of the Consultant.

**11.11.4** **NOTE:** There is provision to make monthly payments or as agreed upon in the approved Inception Report. However, payments can only be made for actual services rendered and not “planned services”. Therefore, during the finalisation of the Inception Report at the beginning of the project, both Parties will need to agree on the monthly deliverables and payment schedule; and the successful service provider shall be expected to indicate the planned monthly staffing resources based on the activity schedule and project cash flows.

**11.12** **Calculating of points for B-BBEE status level of contribution**

**11.12.1** Points will be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

| **B-BBEE Status Level of Contributor** | **Number of Points** |
| --- | --- |
| **1** | **20** |
| **2** | **18** |
| **3** | **14** |
| **4** | **12** |
| **5** | **8** |
| **6** | **6** |
| **7** | **4** |
| **8** | **2** |
| **Non-compliant contributor** | **0** |

 **Table 5: Points for B-BBEE status level of contribution**

**11.13** Bidders are required to complete the preference claim form (SBD 6.1), and submit their original and valid B-BBEE status level verification certificate or a certified copy thereof or a sworn affidavit at the closing date and time of the bid in order to claim the B-BBEE status level point. The points scored by a bidder in respect of the level of B-BBEE contribution will be added to the points scored for price.

**11.14** Only bidders who have completed and signed the declaration part of the preference claim form and who have submitted a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS), or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA) or a sworn affidavit confirming annual turnover and level of black ownership in case of an EME and QSE together with the bid will be considered for preference points. A trust, consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate member.

**11.15** Failure on the part of the bidder to comply with paragraphs 6.11 and 6.12 above will be deemed that preference points for B-BBEE status level of contribution are not claimed and will therefore be allocated a zero (0).

**11.16** The Department of Transport may, before a bid is adjudicated or at any time, require a bidder to substantiate claims it has made with regard to preference.

**11.17** The points scored will be rounded off to the nearest two (2) decimals.

**11.18** In the event that two or more bids have scored equal total points, the contract will be awarded to the bidder scoring the highest number of preference points for B-BBEE.

**11.19** However, when functionality is part of the evaluation process and two or more bidders have scored equal points including equal preference points for B-BBEE, the contract will be awarded to the bidder scoring the highest for functionality.

**11.20** Should two or more bids be equal in all respects; the award shall be decided by the drawing of lots.

**11.21** A contract may, on reasonable and justifiable grounds, be awarded to a Bid that did not score the highest number of points.

1. **RULES OF BIDDING**

**12.1 Format and Submission of Bids**

* + 1. Bid submission requirements must be completed in sections and appendices provided in the bid document.
		2. **Bids must be submitted in two (2) envelopes, one (1) with the technical proposal and the other pricing proposal. Supporting documents required for compliance including a Valid Tax Clearance Certificate and all the SDB documents except for SBD 3.1 and 3.3 must be submitted together with the technical proposal.**

**12.1.3** Bidders must submit their bids on the stipulated closing date and time. Late bids will not be considered. All late bids must be collected within seven (7) days failing which the DOT will discard of such late proposals.

**12.1.4** Format of submission of proposals:

(a) Envelopes must be clearly marked with Company name, DOT BID Number and whether it is the technical or financial response (envelope 1 and 2);

(b) Proposals must be submitted as one (1) original and four protected soft copies. Soft copies must be exact copies of the original document, and should be labelled properly.

**12.1.5** In order to evaluate and adjudicate bids effectively, it is imperative that bidders submit responsive bids. To ensure a bid will be regarded as responsive it is essential to comply with all conditions pertaining to mandatory requirements.

**12.1.6** Each bidder must attach all applicable documents in support of its bid in accordance with the requirements set out in this bid as well as any other relevant materials, photographs and/or attachments.

**12.1.7** Each bid, once submitted, constitutes a binding and irrevocable offer to provide the Services on the terms set out in the bid, which offer cannot be amended after its date of submission.

**12.1.8** Department of Transport (DOT) reserves the right to accept or consider any Bid in full or in part or any responses or submissions in relation thereto.

**12.1.9** The DOT reserves the right to appoint more than one bidder whose bid most successfully conforms to the Criteria and the Requirements in accordance with the terms and conditions described in the TOR.

**12.1.10** The DOT reserves the right to request any additional information that it may require or deem necessary. All such requests shall be in writing.

**12.1.11** After careful consideration and thorough examination of the proposals, DOT shall select the successful Bidder whose proposal most closely satisfies the criteria and the requirements. The lowest price (management fee where applicable) offered will not necessarily be a decisive factor in choosing between Proposals.

**12.1.12** The Department shall publish the results of the outcome of a tender process, including the details of the Successful Bidder in the same media that was used to advertise the bid.

# 13. INFORMATION SESSION

**13.1** A virtual briefing session will be held with the Department as detailed in the advertisement. Although not compulsory, prospective Bidders are advised to attend the briefing session since this session provides bidders with an opportunity to clarify aspects of the process as set out in this document and to address any substantive issues that bidders may wish to raise. Any Briefing Notes, which may be issued by the Department to the Service Providers, should be considered as part of this project.

**13.2** Prospective Bidders should take note of the design document and Annexure A, provided as information to assist in preparing the Bid.

# 14 SUB-CONTRACTING, PARTNERSHIP/CONSORTIUM/JOINT VENTURE AND COMPANY REQUIREMENTS

**14.1** All these details have to be provided upfront. Please provide all the mandatory documents and certificates for each of the JV Partners.

**14.2** The successful bidder must obtain prior DOT approval about to sub-contract, and/or amend the sub-contracting arrangements.

**14.3** A proposal submitted by a company, close corporation or other legal person must be accompanied by a resolution or agreement of the directors or members and be signed by a duly authorized person.

**14.4** A proposal submitted by a partnership must be accompanied by a written partnership agreement.

**14.5** A proposal submitted by a consortium or joint venture of two or more parties must be accompanied by a signed memorandum of understanding between the parties to such consortium indicating:

**14.5.1** the conditions under which the consortium will function;

**14.5.2** its period of duration;

**14.5.3** the persons authorized to represent it;

**14.5.4** the participation of the several parties forming the consortium;

**14.5.5** the benefits that will accrue to each party;

**14.5.6** any other information necessary to permit a full appraisal of its functioning.

# 15 SECURITY AND CONFIDENTIALITY OF INFORMATION

15.1 No material or information derived from the provision of the services under the Contract may be used for any purposes other than those of the Department, except where authorised in writing to do so. All information will be held strictly confidential. The successful Service Provider may be required to sign a Confidentiality Agreement with the Department.

# 16 TERMS AND CONDITIONS

**16.1** The Department reserves the right to amend, modify or withdraw this Terms of Reference (TOR) document or amend, modify or terminate any of the procedures or requirements set out herein at any time and from time to time, without prior notice except where required by law, and without liability to compensate or reimburse any Service Provider.

**16.2** Neither the Department, nor any of its respective officers, or employees may make any representation or warranty, expressed or implied in this TOR document, and nothing contained herein is, or shall be relied upon as, a promise or representation, whether as to the past or the future.

**16.3** The costs of preparing proposals and of negotiating the Contract will not be reimbursed.

**16.4** The Department also reserves the right to call interviews with short-listed Service Providers before final selection, and to negotiate price with the Preferred Service Providers.

**16.5** Firms may not contact the Department on any matter pertaining to their bid from the time when bids are submitted to the time the Contract is awarded. Any effort by a Service Provider to influence bid evaluation, bid comparisons or award decisions in any manner, may result in rejection of the bid concerned.

**16.6** Bid submission requirements must be completed in sections and appendices provided in the bid document.

**16.7 Further Requirements**

**16.7.1** The individuals proposed for professional work on the project shall remain on the project unless the Department grants prior permission to change the team composition. Such permission will not be withheld unreasonably.

**16.7.2** No material or information derived from the provision of the services under the Contract may be used for any purposes other than those of the Department, except where authorised in writing to do so. All information will be held strictly confidential. The successful service provider may be required to sign a Confidentiality Agreement with the Department.

**16.7.3** Copyright of all documents and electronic aids and software programs prepared or developed in terms of the appointment, shall vest in the Department.

**16.7.4** Any Briefing Notes which may be issued by the Department to the successful service providers should be considered as part of this ToR.

**16.7.5** In the event that negotiations between the Department and the successful service providers fail with regard to the conclusion of a Contract, the Department reserves its right not to appoint the successful service providers without incurring any liability to compensate or reimburse the successful service providers.

**16.7.6** The Department of Transport reserves the right to cancel the Contract forthwith and to terminate the service of the successful Service Provider(s) with thirty (30) days’ notice, and to do so if the successful Service Providers becomes unable for any reason whatsoever to implement any of the terms of the Contract due to causes within his/her control, or delay without proper cause. In such an event, the successful Service Provider(s) shall, when called to do so, hand over to the Department all documents and papers which are related to the project.

**16.7.7** The Department will also have the right to:

**16.7.7.1** Discontinue the services of the successful Service Provider(s) at any stage during the project without any obligation to allow the successful service providers to execute the remainder of the project, and to:

**16.7.7.2** Appoint a new Service Provider(s) to execute the remainder of the project, should the Department not be satisfied with the executing of any part of the project by the successful Service Providers.

**16.7.8** Should the Contract be cancelled in terms of paragraph 4.8.7 above, the quantum of remuneration due to the successful service providers for services rendered prior to the date of the termination of the Agreement shall be determined between the Department and the successful Service Provider(s).

**16.7.9** A proposal submitted by a company, close corporation or other legal person must be accompanied by a resolution or agreement of the directors or members and be signed by a duly authorized person.

**16.7.10** A proposal submitted by a partnership must be accompanied by a written partnership agreement.

**16.7.11** A proposal submitted by a Consortium or Joint Venture of two or more parties must be accompanied by a signed memorandum of understanding between the parties to such Consortium or Joint venture indicating:

**16.7.11.1** the conditions under which the Consortium or Joint Venture will function;

**16.7.11.2** its period of duration;

**16.7.11.3** the persons authorized to represent it;

**16.7.11.4** the participation of the several parties forming the Consortium or Joint venture;

**16.7.11.5** the benefits that will accrue to each party;

**16.7.11.6** any other information necessary to permit a full appraisal of its functioning.

**16.7.12** The successful Service Provider(s) may be required to enter into a Service Level Agreement (SLA) prior to appointment.

**16.7.13** The Department is not bound to accept any of the proposals submitted and reserves the right to call for best and final offers from short-listed service providers before final selection.

**16.7.14** Firms may ask for clarification on this ToR or any of its Annexures up to close of business forty-eight (48) hours before the deadline for the submission of bids. Any request for clarification must be submitted by email to the Bid Office. Copies of questions and answers will be emailed to all firms that register at the briefing session, without revealing the identity of the source of the questions.

**16.8 ALL BIDDERS MUST BE REGISTERED ON THE CENTRAL SUPPLIER DATABASE AT NATIONAL TREASURY.**

More information in this regard is available on [www.ocpo.treasury.gov.za](http://www.ocpo.treasury.gov.za).

Proof of registration must be submitted together with the technical proposal.

The suppliers must be existing in SITA RFB 2003 database. Bidder to supply proof.

**16.9** Bidders may provide any additional information deemed important for the DOT to consider.

**16.10** Prospective Bidders must at all times comply with the Department’s Supply Chain rules and processes with regard to all projects and payments.

# 17. PAYMENT

**17.1** **Invoicing:**

The Contractor’s Project Manager shall, at the end of each deliverable, submit a consolidated invoice, certified as correct by the Contractor’s Project Manager, showing the actual work performed, hours worked, and manpower inputs for the task and associated costs accompanied by all supporting documents.

**17.2** **Payment Information**

**17.2.1** An invoice only becomes due and payable:

(a) When the Project Manager signs-off on the specific deliverable and submits the invoice for payment; and

(b) When the invoice is correct with regards to calculations, information contained, banking details and supporting documents.

**17.2.2** It is important to ensure that invoices are correctly submitted and reference the project name, DOT number and Order Number.

**17.2.3** Non-compliance will delay the payment process.

**17.3** **Penalties**

**17.3.1** Poor performance will result in penalties that include withholding of a minimum 30% of the total invoice of each affected phase / milestone until it is fixed before the final product is submitted. In the case where the performance has not been improved to the satisfaction of the Department and the final product is handed over, the original amount held back will not be paid over to the Service Provider under any circumstances. On the other hand, an improved quality and/or performance, at the satisfaction of the Department, will require the outstanding part of the held back invoice to be paid to the Service Provider in full but with no additional interest.

**17.3.2** The project milestones/phases are expected to be adhered to. Any deviation must be approved by the Department prior to any commencement of the changes. Failure to do so will result in a 5% non-payment of that particular and/or affected phase(s).

**17.3.3** Notwithstanding item 7.2 above, failure to meet the deadline as stipulated in this TOR will result in 30% of the total outstanding payments for the project as whole not being paid over to the Service Provider if the poor performance is attributed to the Service Provider unless there is undisputed evidence that the fault lies with the Department.

# 18 CONTACT DETAILS

 **The contact persons are:**

|  |
| --- |
| **ADMINISTRATIVE ENQUIRES MUST BE ADDRESSED TO:** |
| **Mr John Mashinini** Supply Chain Management Tel: (012) 309-3000 / 3045Email: MashiniJ@dot.gov.za  | **Mr Lucky Mashile**Supply Chain ManagementTel: (012) 309-3000 / 3429Email: MashileL@dot.gov.za  |

**18.1** The Bid Evaluation Committee reserves the right to call bidders to complete any outstanding elements of the bids, make presentations of their bids, and/or present best and final offers, if required, at the bidders’ cost, prior to the finalisation of the evaluation process.

**18.2** Any bidder that fails to submit any element of the bid submission requirements set out in terms of this ToR will be rejected as unsuitable for evaluation and will therefore not be considered further. The decision of the Department’s Bid Adjudication Committee will be final.

|  |
| --- |
| **TECHNICAL ENQUIRES:** |
| **Mr Eugene Manyaka**Tel (012) 309 3704Email: ManyakaE@dot.gov.za  | **Ms Atang Seabelo**Tel: (012) 309-3589Email: SeabeloA@dot.gov.za  | **Mr Tshepo Chauke**Tel: (012) 309-3022Email: ChaukeT@dot.gov.za  |