



REQUEST FOR QUOTATION (RFQ)

The South African Qualifications Authority (SAQA) invites Service Providers to submit a Quotation for the requirements stipulated below:

DOCUMENT NUMBER:	SAQA RFQ- SAGE 300 ERP (ACCPAC)
RFQ ISSUE DATE:	06 March 2023
RFQ CLOSING DATE AND TIME:	10 March 2023 @11h00
RFQ VALIDITY PERIOD	90 Days (from RFQ closing date)
DESCRIPTION:	Maintenance and support of SAGE 300 ERP (ACCPAC) including new installations, upgrades, training, and development to the South African Qualifications Authority (SAQA) for a period of (2) years.
RESPONSES TO THIS RFQ SHOULD BE FORWARDED TO:	rfq@saqa.co.za
ENQUIRIES	Mr Keshlene Naicker on email KNaicker@saqa.co.za

SECTION 1: TERMS OF REFERENCE

1. INTRODUCTION

- 1.1. The South African Qualifications Authority (SAQA) is a public entity listed in Schedule 3A of the Public Finance Management Act (PFMA), which aims to oversee the implementation of the National Qualifications Framework (NQF) and ensure the achievement of its objectives.
- 1.2. In terms of section 51 (1) (c) of the PFMA an Accounting Authority, a public entity is responsible for the management, including the safeguarding, of the assets of the public entity.
- 1.3. The SAQA management is committed to executing its responsibilities, effective provision of a safe and secure working environment and safeguarding its assets as a service to the Authority.

2. PURPOSE

- 2.1. The purpose of this bid is to appoint a suitably qualified and accredited Sage service provider to provide SAQA with end-to-end software system training, support and maintenance service for Sage 300 ERP (formerly Sage ERP Accpac) including new installations, upgrades, training, and development for a period of 2 years.

3. BACKGROUND

- 3.1. SAQA oversees the implementation of the National Qualifications Framework (NQF) and ensures the achievement of its objectives.
- 3.2. SAQA's mission is to ensure the development and implementation of a National Qualifications Framework that contributes to the full development of each learner and to the social and economic development. Therefore, the organisation plays an influential role in the entire education and training sector.
- 3.3. These terms of reference are intended to provide a scope of work and deliverables, against which to appoint the service provider.

4. SCOPE OF SERVICES REQUIRED

- 4.1. The following scope of services form part of the services component and are required for the maintenance and support of the software system to ensure that the system continues functioning effectively and optimally and ensure a sound financial system to the SAQA, in line with service level standards:
 - 4.1.1 Break-fix Services.
 - 4.1.2 Ad-hoc services are clarified to cover all SAGE 300 Accpac Consulting
 - 4.1.3 Software Health Checks

South African Qualifications Authority(SAQA RFQ)

- 4.1.4 Software Enhancements – enhancements that result in improved performance, reliability, and usability in a changing environment.
- 4.1.5 Client Administrative Functions
- 4.1.6 Service Delivery Management
- 4.1.7 Software System Reporting
- 4.1.8 Software Documentation Upkeep
- 4.1.9 Facilitation of License renewals
- 4.1.10 Recommend new products or add-on modules to the system to ensure that SAQA is functioning effectively and efficiently.
- 4.1.11 Installing software upgrades and security patches for the Sage 300 ERP versions as and when available by Sage in consultation with management.
- 4.1.12 Modifications to the system where errors are occurring during operational processing, diagnosis is performed, and errors are resolved accordingly (bug fixes).
- 4.1.13 Implement interfaces with other systems that are used by SAQA.
- 4.1.14 Attend to SAQA's request regarding functional issues encountered during the operational usage of the modules within the system remotely or through onsite visits.
- 4.1.15 Providing telephonic and email support throughout the contract period.
- 4.1.15 Training of users and application administrators. Provide end-user manuals and updates to be done based on system changes.
- 4.1.16 Provide a contract management module to ensure the accuracy of SAQA's commitments.
- 4.1.17 Provide an automated solution for inventory management, where applicable.
- 4.1.18 Data integrity checks and reporting
- 4.1.19 Review of application configuration to ensure optimal performance and identify security issues.
- 4.1.19 Report-writing and customized reporting as per requests.

- 4.2. SAQA uses the following IT infrastructure environment to host the Sage 300 ERP (Accpac) system:
 - 4.2.1. Microsoft Windows Server 2012 R2 and beyond
 - 4.2.3 SQL server 2014 and beyond
 - 4.2.4 Sage 300 version: version 2018

5. SERVICES LEVELS AND APPLICABLE PENALTIES

Event	Definition	Requirements	Target	Penalties
Priority Level 1	Complete system failure affecting the majority or all users	Mean time to response < 2 hours	100% adherence to timelines.	20% of the total monthly invoice per incident.
Mean time to repair <4 hours		100% adherence to timelines.		
Priority Level 2	Partial system failure affecting specific users or system is functional but in a degraded state	Mean time to response < 2 hours	100% adherence to timelines.	10% of the total monthly invoice per incident.
Mean time to repair < 8 hours		100% adherence to timelines.		
Priority Level 3	Maintenance or approved enhancements	Mean time to response < 4 hours	100% adherence to timelines.	10 % of the total monthly invoice per incident.
Mean time to repair as scheduled		100% adherence to timelines.		

6. PENALTY MAXIMUM LIMIT AND SERVICE DISPUTES

6.1 The maximum penalties for poor performance and other non-compliance to

The contract will be limited to 20% of the total monthly invoice fees, per incident.

6.2 Furthermore, should the 20% limit be reached four (4) times during the contract period, the SAQA reserves the right to immediately enter a service dispute that may result in the termination of the contract.

6.3 Notwithstanding, and without prejudice to any other rights SAQA has, the SAQA reserves the right to enter service disputes at any point in time with the view of contract cancellation. During a service dispute, the service provider shall continue to render services in terms of these service levels.

6.4 SAQA is currently using the following modules for the Sage 300 Accpac– Version 2018. There are different numbers of users per module, however not limited to the numbers expressed below:

ITEM	SOFTWARE MODULE DESCRIPTION	USER PER MODULE
SAGE 300 Premium ERP – version 2018	System Manager	1
	Optional Fields and Tables	1
	Accpac MS-SQL Lanpak	20
	General Ledger	1
	Accounts Receivable	1
	Accounts Payable	1
	Inventory Control	1
	Purchase Orders	1
	Cashbook	1
	Cashbook MS-SQL Lanpak	10
	Rec Xpress	1
	EFT Express	1
	Norming Asset Management	1
	Business Intelligence – Manager	1
	SAGE CRM 100 and 2 users	2
	Business Integrator	

SECTION 2: EVALUATION CRITERIA

1. The bid will be evaluated in three (3) stages:

Stage 1: Administrative compliance checks

Stage 2: Screening of mandatory requirements

Stage 3: Price and Preference Points

1.1 STAGE 1: Administrative compliance checks

- 1.1.1.1. Bids will be screened to ensure compliance with all administrative requirements.
- 1.1.1.2. Bidders must ensure that they complete and sign all bid documents and that they attach all required documents, including the Central Supplier Database details and information required by the RFQ.
- 1.1.1.3. Bids that do not comply with administrative compliance may be disqualified by SAQA.

1.2. STAGE 2: Screening of mandatory requirements

For a bidder to qualify to be evaluated for functionality, a bidder must not have been disqualified on compliance with any mandatory requirement preceding this phase of the evaluation such as.”

- a. **Submission of a Sage 300 Business Partner Accreditation letter/certificate and status.**

1.3. STAGE 3: Price and Preference Points

Price and Preference Points Evaluation as follows:

- a) All bidders that have passed the mandatory requirements will be evaluated in terms of the 80/20 system prescribed by SAQA in linewith PPR 2022 as follows:
 - i) 80 Points for pricing.
 - ii) 15 preference points for the company that has atleast 51%black ownership
 - iii) 5 preference Points forthe company that has at least 30%black woman ownership.

NB: Bidders must submit the certified B-BBEE Certificates copies/Sworn Affidavits indicating ownership percentage to claim the preference point

SECTION 3: PRICING SCHEDULES SBD 3.1

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

TOTAL COST OF OWNERSHIP BREAKDOWN			
ITEM DESCRIPTION	ESTIMATED NUMBER OF HOURS (for evaluation purposes only)	HOURLY RATES (VAT INCL) R	TOTAL ANNUAL PRICE (VAT INCL. AND ESCALATIONS) R
Support and maintenance, upgrades, training, and development (Time and Material) Year 1	100		
Year 2	100		
New products or add-on modules (Including installation, testing and production)	250		
License fees will be charged based on the Sage price list. The Service provider is to assist with facilitating the payment of the licenses for the three (2) years	NO COST TO THE SERVICE PROVIDER		
TOTAL PRICE (VAT INCL) - (2 YEARS) Inclusive of Time, Material and New Installation/s / Development.) NB: Total costs include any other disbursements, travel expenses, and the like.			R

RFQ Special Conditions

1. Bidders must state their National Treasury (CSD) Central Supplier Database's Supplier Number or Unique number and Tax Pin in their bids to enable SAQA to confirm suppliers' tax status.
2. Bidders are required to submit an original or certified copy of the B-BBEE certificate or Sworn Affidavit as per the B-BBEE Act. The SANAS Logo should be visible on the B-BBEE Certificate.
3. Bidders must complete, sign, and submit SBD 4 and SBD 6.1 forms.
4. The proposal and required documents must be submitted using the PDF format only, via email to rfq@saqa.co.za.

1. PROTECTION OF PERSONAL INFORMATION

- 6.1 In this clause, the words "personal information", "processing" and "responsible party" have the meanings ascribed to them in the Protection of Personal Information Act, 2013 (Act No.4 of 2013).
- 6.2 SAQA will comply with the Protection of Personal Information Act, 2013 (Act No.4 of 2013, (POPIA) by lawfully processing personal information submitted by bidders in accordance with the conditions of lawful processing as set out in POPIA.
- 6.3 All bidders must comply with their obligations as set out in POPIA for which they are a Responsible Party before sharing any information with SAQA.
- 6.4 SAQA will not be held liable for any non-compliance with the provisions of POPIA or unlawful processing or sharing of information by a bidder.

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

2.2 Do you, or any person connected with the bidder, have a relationship

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.

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

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

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.

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 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 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

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the 90/10 preference point system.
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) Either the 90/10 or 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	
SPECIFIC GOALS	
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:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 \mathbf{P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)}
 \end{array}$$

Where

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

3.2.1. POINTS AWARDED FOR PRICE

$$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \text{ or } P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

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

- 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 organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

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 (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
At least 51% Black Ownership		15		
30% or more Black Woman Ownership		5		

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:

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