

REQUEST FOR QUOTATION (RFQ) FOR INFORMATION COMMUNICATION TECHNOLOGY (ICT) STRATEGIC PLAN AND POLICY REVIEW

Reference Number	Iziko ICT / RFQ 14/06/2024
Description	Information Communication Technology (ICT) Strategic Plan and Policy Review
Address	Iziko South African Museum, 25 Queen Victoria Street, Cape Town, 8001
Attention	Noleen Donson and Siphamandla Oupa
Site	Iziko South African Museum
Closing date and time for submission	08 July 2024 11:00AM
Method of delivery	Quotes / Proposals, and accompanying documentation, must be emailed to (SCM) 021 481 3917: Esihle Ntlaninge at entlaninge@iziko.org.za and soupa@iziko.org.za
Technical enquiries	Andre Makka, amakka@iziko.org.za
Name of Company	
CSD Supplier Number (MA.....Number)	
B-BBEE Status Level of Contribution	
Quote Price (Incl Vat)	
Signature	

BIDDER'S DISCLOSURE (SBD 4)

1. PURPOSE OF THE FORM (SBD 4)

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 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.

2.2 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:

.....
.....

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,

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.

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 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 (Company Name)

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

The applicable preference point system for this tender is the **80/20** preference point system.

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
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$

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

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 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	Evidence	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)
Persons, or categories of persons, historically disadvantaged- (HDI) by unfair discrimination on the basis of	<ul style="list-style-type: none">• Proof of B-BBEE certificate;• Company Registration Certification• Identification Documentation.• CSD report		

Race: Black persons (ownership)* 50% or more black ownership = 20 points Less than 50% black ownership = 10 points 0% black ownership = 0 points			
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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

<p>..... SIGNATURE(S) OF TENDERER(S)</p>	
SURNAME AND NAME:
DATE:
ADDRESS:

REQUEST FOR QUOTATION FOR: INFORMATION COMMUNICATION TECHNOLOGY (ICT) STRATEGIC PLAN AND POLICY REVIEW

Iziko Museums of South Africa (Iziko) invites service providers to submit quotes for Information Communication Technology (ICT) Strategic Plan and Policy Review.

BACKGROUND

Iziko Museums of South Africa (Iziko) is a schedule 3A public entity and non-profit organisation, partly subsidised by the National Department of Sport, Arts & Culture (DSAC), bringing together 11 national museums and a Social History Centre situated in the Western Cape under a single governance and leadership structure. Iziko was established in terms of the Cultural Institutions Act, 1998 (Act No. 119 of 1998) and is required to comply with the Public Finance Management Act (PFMA), 1999 (Act No. 1 of 1999, as amended) and its concomitant Regulations.

OVERVIEW

Iziko Museums, as a public entity, operates within a strict and defined compliance framework. Therefore, it is imperative that organizational policies are regularly developed, reviewed, updated, and implemented. The Information, Communications, and Technology (ICT) unit currently has nine policies, an ICT Governance Framework, and a Strategic Plan, none of which have been reviewed in the past three years. Additionally, Iziko seeks to address certain governance and management issues that have arisen during a recent audit engagement.

Iziko extends a call for proposals from suitably qualified and experienced service providers to assist with the review and update of the ICT policies, the ICT Governance Framework, and the Strategic Plan. These updates must be appropriate for the organization and in line with National Treasury's prescripts.

1. Scope of Work

The scope of services to be provided is outlined below:

- Assessing 9 and amending existing policies to incorporate internal audit recommendations as outlined in the ICT internal Audit report.
- Development of a Patch Management Policy
 - Review of current patch management tools and development of a vulnerability management procedure

- Revision of the incident response plan to include specific procedures for addressing patch-related security incidents
- Develop and Implement Firewall Policy and Standards
- Specifically addressing deficiencies in the ICT Security Policy to:
 - Assist with hardening network devices against a security baseline by developing a Security Baseline
 - Address internal audit findings as outlined in the ICT internal Audit report.
- Making recommendations to the Iziko ICT Steering Committee
- Combining all policies into a standardised policy manual which are enforceable, relevant, and suitable to Iziko's size and existing infrastructure and systems
- Developing ICT procedures in line with policy in consultation with management
- Assessing and updating the existing ICT Governance Framework
- Assessing and updating the existing ICT Strategic Plan in consultation with Iziko's ICT Steering Committee, including making presentations on recommendations and consulting with the steering committee
- Assisting with the compilation of an ICT Risk Register

The contract period will be six months from the date of appointment.

Table 1: Delivery Time Schedule

	Service Description	Time frame for delivery
1.	Contracting – first meeting and agreement on timelines	July 2024
2.	First draft recommendation based on existing policies, Strategic Plan and Governance Framework	August 2024
3.	Presentation of recommendations to ICT steering committee	September 2024
4.	Second draft documents for comment	September 2024
6.	Proposal on inclusions into policies	September 2024
7.	Final Presentation of documents	October/November

The selected service provider shall work from their offices with coordinated visits to Iziko Museums when and if necessary.

The selected service provider shall be required to demonstrate their capacity to deliver the services required by Iziko as per the criteria below:

Functionality Criteria

1 Relevant skills and experience	Description	Weighting
Track record of previous work done demonstrating bidder's experience in designing and reviewing of ICT Government Framework, Strategic Plan, Policies and Procedures. This must be demonstrated by means of reference letters from clients on the client's letter head for work related to the drafting and reviewing of ICT Policies.	Submit Reference letters	
	• 5 and above reference letters from previous projects.	25
	• 3-4 reference letters from previous projects.	15
	• 1-2 reference letters from previous projects	5
	• No reference letters provided	0
2 Management capacity		
Bidders should demonstrate capacity to deliver the work and that knowledge of relevant regulations and standards such as GDPR, HIPAA, and local cybersecurity laws exists within the team by submitting a company profile which includes details of the management team with relevant experience in ICT policy development, risk management, and strategic planning which demonstrates an understanding of the requirements of the project	<ul style="list-style-type: none"> Clear evidence of similar project completion. Detailed Company Profile, highlighting team structure and resources. Understanding and compliance with GDPR, HIPAA, and local cybersecurity laws. Relevant certifications or documented training. Detailed Management Team profiles showing extensive experience in ICT policy, risk management, and strategic planning. Comprehensive explanation of the approach to meeting project requirements. 	25
	<ul style="list-style-type: none"> Evidence of similar projects, but with less detail on company resources. Basic profile with key team members listed. General knowledge of regulations, lacking specifics. Some relevant certifications or training. Management profiles showing relevant but not extensive experience. Basic explanation of project approach. 	15

<p>Bidders should use established frameworks and methodologies for ICT governance and security (e.g., COBIT, NIST Cybersecurity Framework).</p> <p>Ability to tailor policies to the specific needs and context of the organization.</p>	<p>deliverables. The methodology clearly aligns with established ICT governance and security frameworks such as COBIT and the NIST Cybersecurity Framework. Demonstrates a deep and thorough understanding of the subject matter, including both theoretical and practical aspects. Provides a realistic and detailed plan to deliver all aspects of the project within six months, with clearly defined milestones and deliverables.</p> <ul style="list-style-type: none"> • The bidder presents a solid methodology that covers most key aspects of the deliverables. It aligns with established ICT governance and security frameworks but may lack some detail or clarity. Demonstrates a good understanding of the subject matter, with some insights into both theoretical and practical aspects. Provides a feasible plan to deliver the project within six months, but some milestones or deliverables might be less defined. • The bidder presents a basic methodology that covers the main aspects of the deliverables but lacks depth and detail. It may reference established frameworks but not comprehensively. Demonstrates a basic understanding of the subject matter, with limited insights into either theoretical or practical aspects. Provides a general plan to deliver the 	<p>15</p> <p>5</p>
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	<p>project within six months, but it may lack detail, clarity, or realistic milestones.</p> <ul style="list-style-type: none"> The bidder fails to present a coherent methodology or does not align with established ICT governance and security frameworks. Demonstrates little to no understanding of the subject matter. Provides an unrealistic or vague plan for delivering the project within six months, with no clear milestones or deliverables. 	0
Total Maximum score		100

Bidders are required to achieve a score of 70 points to be considered for the specific goals and Price evaluations.

Pricing

Price is an important factor as it ensures optimum value for money and should take into account the full duration of the contracting period. A cost schedule detailing, inclusive of VAT, any disbursements, including delivery costs, as well as escalations, if applicable, must be provided in the table below.

Table 2: Cost Schedule

No	Service Description	Costing per service
1	Assessing 9 and amending existing policies	
2	Development of a Patch Management Policy	
3	Develop and Implement Firewall Policy and Standards	
4	Addressing deficiencies in the ICT Security Policy	
5	Combining all policies into a standardised policy manual	
6	Recommendations for additional ICT policies and best practice to Iziko	
7	Developing ICT procedures in line with policy	
8	Written recommendations for additional ICT policies and best practice for the Iziko ICT Steering Committee	
9	Review and Update of a Governance Framework	
10	Review and Update of ICT Strategic Plan	

	Disbursement's escalations if applicable for the duration of the contract	
	Total Excluding VAT	
	VAT 15%	
	Total including VAT	

2. Compliance Documents

Service Providers must submit all documents as outlined in Table below.

1	Central Supplier Database Report – with supplier number and company details (www.csd.gov.za) and Tax Status Verification Pin together with tax registration number.
2	Detailed pricing structure: A cost schedule detailing full cost breakdown, inclusive of VAT, any disbursement, and escalations, if applicable, etc. for the entire duration of the proposed contract must be provided.
3	A Valid B-BBEE Certificate or Sworn Affidavit to determine the Service provider's status level.
4	Annexure B - Confidentiality and Non-Disclosure Agreement.

Note: Failure to supply any of the compliance documents stipulated may lead to the quote not being considered.

Table 2 Preferential Points

	Specific goals allocated points	Price
Total maximum points	20	80

4. PRICING SCHEDULE

Pricing Instructions

1. Payment will be made based on the deliverables for the goods received.
2. Payment will only be made on the basis of work completed satisfactorily, and invoices provided and approved by the project manager.
3. Offer to be valid for 60 days from the bid closing date.

DESCRIPTION	AMOUNT (Incl VAT)

TOTAL AMOUNT (INCLUDING VAT)	

Please Note: a formal detailed quotation to be sent with proposal. The pricing schedule above and formal quotation must include all applicable costs and there can be no variation after award has been made.

6. Formal Contract

- a) The proposal and appended documentation read together form the basis for an agreement to be negotiated and concluded in a formal contract between Iziko and the preferred Service Provider.
- b) A mere offer and acceptance shall not constitute a formal contract of any nature for any purpose between Iziko and the preferred Service Provider/s.

7. General Principles

- a) The lowest or only quotation received will not necessarily be accepted.
- b) Iziko and its Council reserves the right to accept or reject any quotation in response to the Request to Quote and to withdraw its decision to seek the provision of these services at any time.

8. DECLARATION

The undersigned, who warrants that he / she is duly authorized to do so on behalf of the enterprise:

- i) confirms that neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- ii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iii) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest; and ;
- iv) confirms that the contents of this questionnaire/forms (SBD 4, & 6.1) are within my personal knowledge and are to the best of my belief both true and correct
- v) accept that, in addition to cancellation of a contract, action may be taken against me should the Declaration prove to be false.

Signed

Date

Name

Position

Enterprise
name

Please note that if the supporting documentation is not provided then the submission will be classified as non-responsive.

1. Disqualification

Please note that if a bid document is not filled in correctly or completely, or complied with the specification, or is delivered/send after the bid closing date and time, or the supplier is not registered on the CSD or supplier has a non-compliant tax status, then unfortunately that bidder maybe disqualified. Please return this document with the supporting documents.

2. Bid Document Submission

Emailed tender documents will be accepted. However, the onus is on the tenderer to ensure that complete email documents have been received by the IZIKO by the due date and time.

Please note that any alterations to the tender document other than filling in the tenderer's details and tender price will automatically disqualify the tenderer.