

BID DOCUMENT

BID NUMBER	FIC/RFB/HALO ITSM SOLUTION/03/2026/27
ISSUE DATE	27 August 2026
CLOSING DATE	17 September 2026
TIME	11:00
DESCRIPTION	Appointment of a service provider for the provision of support and maintenance services, including the enhancement, configuration and expansion of the Financial Intelligence Centre's existing HALO ITSM Solution.
SUBMIT	☒ One original printed copy ☒ One electronic copy (preferably on a memory stick) of the request for bid (RFB) document
DELIVERY ADDRESS	TENDER BOX FINANCIAL INTELLIGENCE CENTRE BYLS BRIDGE OFFICE PARK, BUILDING 11 13 CANDELA STREET HIGHVELD EXT 73 CENTURION • Bidders must request an access pin 24 hours in advance from: tenders@fic.gov.za • Drivers must present an ID or valid driver's licence at the main gate to enter the office park.
CSD NUMBER	MAAA ...

DOCUMENTS IN THIS BID PACK

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PART A: STANDARD BIDDING DOCUMENT INVITATION – SBD 1

You are invited to submit a bid in response to the requirements specified by the Financial Intelligence Centre.

Bid number	FIC/RFB/HALO ITSM SOLUTION/03/2026/27
Closing date	17 September 2026
Closing time	11:00
Description	Appointment of a service provider for the provision of support and maintenance services, including the enhancement, configuration, and expansion of the Financial Intelligent Centre's existing HALO ITSM Solution.
Deposit the bid response document(s) in the tender box at:	
Financial Intelligence Centre, Blys Bridge Office Park, Building 11, 13 Candela Street, Highveld Ext 73, Centurion	
Direct bidding procedure enquiries to	
Contact person	Supply Chain Management
Contact number	012 641 6000
E-mail address	tenders@fic.gov.za
Direct technical enquiries to	
Contact person	Supply Chain Management
Contact number	012 641 6000
E-mail address	Tenders@fic.gov.za

Supplier or service provider information	
Name of bidder	
Postal address	
Physical address	
Contact number	
Mobile number	
E-mail address	
VAT registration number	
Bidder compliance status	
Tax compliance system PIN	
Central Supplier Database (CSD) number	MAAA xxx
B-BBEE status level verification certificate	☐ YES ☐ NO
B-BBEE status level sworn affidavit	☐ YES ☐ NO
B-BBEE Requirements	
A B-BBEE status level verification certificate or sworn affidavit (for EMES and QSES) must be submitted to qualify for B-BBEE preference points	
Are you the accredited representative in South Africa for the goods, services, or works offered?	☐ YES ☐ NO
Are you a foreign-based supplier or service provider for the goods, services, or works offered?	☐ YES ☐ NO
To be completed by foreign suppliers or service providers	
Is the entity a resident of South Africa?	☐ YES ☐ NO
Does the entity have a branch in South Africa?	☐ YES ☐ NO
Does the entity have a permanent establishment in South Africa?	☐ YES ☐ NO
Does the entity source any income in South Africa?	☐ YES ☐ NO

Is the entity liable for any form of taxation in South Africa?	☐ YES ☐ NO
If all of the above questions are answered with "NO," there is no obligation to register for a tax compliance status system PIN code with the South African Revenue Service (SARS). If registration is required, please follow the instructions in section 2.3 below.	

PART B: TERMS AND CONDITIONS FOR BIDDING

1. Bid submission
1.1 Bids must be delivered by the stipulated time to the correct address. Late bids will not be accepted for consideration. 1.2 All bids must be submitted on the official forms provided or in the manner prescribed in the bid document – not to be re-typed. 1.3 This bid is subject to the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations, 2022, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. 1.4 The successful bidder will be required to complete and sign a written contract form (SBD 7).
2. Tax compliance requirements
2.1 Bidders must ensure compliance with their tax obligations. 2.2 Bidders are required to submit their unique personal identification number (PIN) issued by SARS to enable the organ of state to verify the taxpayer's profile and tax status. 2.3 Application for tax compliance status (TCS) PIN may be made via e-filing through the SARS website www.sars.gov.za. 2.4 Bidders may also submit a printed TCS certificate together with the bid. 2.5 In bids where consortia, joint ventures or sub-contractors are involved, each party must submit a separate TCS certificate or PIN or CSD number. 2.6 Where no TCS PIN is available, but the bidder is registered on the CSD, a CSD number must be provided. 2.7 No bids will be considered from persons in the service of the state, companies with directors who are persons in the service of the state, or close corporations with members persons in the service of the state.

Failure to comply with the stated requirements may result in the bid being deemed invalid.

Signature of bidder	
Capacity under which this bid is signed <i>Proof of authority must be submitted e.g. company resolution</i>	
Date	

PART C: SPECIAL CONDITIONS OF CONTRACT

In this document words in the singular also mean in the plural and *vice versa*, and words in the masculine also mean in the feminine and neuter.

The General Conditions of Contract (GCC) will form part of this bid document and may not be amended.

Special Conditions of Contract (SCC) relevant to this bid, compiled separately for this bid (if applicable) will supplement the GCC. Where there is a conflict, the provisions in the SCC shall prevail.

Copies of the GCC are available from the website:

<https://www.treasury.gov.za/divisions/ocpo/sc/generalconditions/general%20conditions%20of%20contract.pdf>

SPECIAL CONDITIONS THAT THE SERVICE PROVIDER OR BIDDER MUST NOTE

1. FRAUD AND CORRUPTION

- 1.1. All bidders must note the implications of contravening the Prevention and Combating of Corrupt Activities Act, 2004 (Act 12 of 2004) and any other applicable Act.
- 1.2. Bidders must refrain from engaging with individuals who claim to represent the FIC and who offer to secure favourable outcomes of bids. For more information read the following notice on the FIC website: <https://www.fic.gov.za/2025/07/18/advisory-fic-procurement-process/>.
- 1.3. The FIC will never contact bidders outside the bidding process. Furthermore, no individual and/or entity is permitted to request payments, bribes, or any form of gratification in exchange for favourable consideration in any bidding process. The FIC evaluates all bids strictly on merit and in accordance with established procurement procedures and applicable regulations. Bidders should refrain from engaging with individuals who claim to represent the FIC and/or those who offer to secure favourable outcomes on bids. Should any bidder be contacted in this regard via messaging, calls or e-mails, refer this to scams@fic.gov.za or the FIC's confidential Fraud Hotline on 0800 701 701.

2. NEGOTIATION

- 2.1. The FIC has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed service.

2.2. The FIC shall not be obliged to accept the lowest price for any bid, offer or proposal in part or in whole.

2.3. All respondents will be informed whether they have been successful or not. A contract will only be deemed to be concluded when reduced to writing in a contract form signed by the designated responsible persons from both parties. The designated responsible person of the FIC is the Supply Chain Manager or his/her delegate authorised in writing.

3. REASON FOR REJECTION

3.1. The FIC shall reject a proposal for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

3.2. The FIC may disregard the bid of any bidder if that bidder, or any of its directors:

3.2.1. Have abused the supply chain management system of the FIC

3.2.2. Have committed proven fraud or any other improper conduct in relation to such a contract

3.2.3. Have failed to perform on any previous contracts where proof exists of this failure to perform.

3.3. Such actions shall be communicated to the National Treasury.

4. PAYMENT

The FIC will pay the service provider the fee as set out and agreed upon in the final contract. No additional time frames for payment or amounts will be payable by the FIC to the supplier or service provider.

4.1. The supplier or service provider shall invoice the FIC for the agreed services rendered as per their contractual agreement with the FIC. No payment will be made to the supplier or service provider unless an invoice, complying with section 20 of the Value Added Tax Act, 1991 (Act 89 of 1991), has been submitted to the FIC.

4.2. The FIC shall make payment into the provided supplier or service provider bank account usually 30 days after receipt of an acceptable, valid invoice. Banking details must be submitted as soon as this bid is awarded.

4.3. The supplier or service provider shall be responsible for accounting to the appropriate authorities for its income tax, VAT or other amounts of money required to be paid in terms of applicable law.

5. PRESENTATION OR DEMONSTRATION

The FIC reserves the right, if needed, to request a site visit, presentations or demonstrations from short-listed bidders.

PART D: TERMS OF REFERENCE OR MINIMUM SPECIFICATION FOR THE WORK

1. INTRODUCTION

- 1.1.** The Financial Intelligence Centre (FIC) invites suitably qualified and experienced bidders to submit proposals for the enhancement, configuration and expansion of the FIC's existing HALO ITSM solution.
- 1.2.** The FIC currently uses HALO ITSM as its cloud-based IT Service Management platform to support internal service-rendering divisions and an externally facing contact centre. The solution has been customised to align with approved business processes and remains a critical platform for managing service requests, incidents, approvals, workflows, reporting and operational service delivery.
- 1.3.** The purpose of these Terms of Reference is to outline the FIC's requirements for further enhancing the current HALO ITSM implementation, including improvements to workflows, service categories, approval processes, reporting capabilities, system administration and the onboarding of additional tenants. The required services are intended to strengthen operational efficiency, improve service management controls, support broader business adoption and ensure that the platform continues to meet the evolving needs of the FIC.
- 1.4.** The successful bidder will be expected to demonstrate relevant HALO ITSM expertise, including the ability to assess current configurations, recommend appropriate enhancements, implement approved changes, support tenant onboarding, provide knowledge transfer and ensure that all deliverables are aligned with the FIC's operational, governance and security requirements.
- 1.5.** All material and information provided by the Financial Intelligence Centre (FIC) must be treated as confidential and may not be disclosed to any third party without the prior written consent of the FIC. Similarly, all materials contained in a bidder's response will be treated as confidential. However, such information may be made available to FIC business users and relevant stakeholders for the purpose of evaluating the response.

2. BACKGROUND TO THE FIC

- 2.1.** The Financial Intelligence Centre (FIC) currently uses the HALO ITSM cloud-based solution as its IT Service Management (ITSM) platform. The solution supports both internal service-rendering divisions and an externally facing contact centre and is customised to align with approved business processes.
- 2.2.** The objective of this requirement is to enhance and extend the current HALO ITSM implementation by addressing the following areas:

- 2.2.1 Improve existing workflows, service categories and business processes through targeted system enhancements.
- 2.2.2 Onboard additional tenants to support broader business adoption and operational requirements
- 2.2.3 Acquiring additional licenses
- 2.2.4 Support and maintenance services

3. SCOPE OF WORK

To be completed by the Bidder

3.1. The table below outlines the minimum deliverables that must be included in the proposal, together with the additional scope requirements applicable to this service enhancements.

Bidders must indicate their compliance to the technical requirements and scope by **YES/NO** in the box provided below

<i>Category</i>	<i>Functional Requirement</i>	<i>Bidder Compliant with Specification (Yes/ No)</i>	<i>Reference Page in proposal</i>
ICT Change Management	- Additional standard change templates. - Enhance existing standard, normal and emergency change templates and form. - Enable the automatic publication of the weekly Forward Schedule of Change. - Publish the annual maintenance schedule. - Enable incidents to be linked to change request records or vice versa.		
Problem Management	- Enable incidents to be linked to problem records or a problem ticket to be generated from an incident ticket. It should maintain all information captured on the incident ticket. - Remove SLA from problem tickets.		
Approvals	- SLA must start only once all approvals are granted. - Add alternate or nominated approval capability.		

	• Configure approval and rejection email notifications. • Ensure rejected tickets move to resolved status and email notifications to requestors. • Review current approvals for correctness and applicability.		
Ticket Status and SLA	• Ensure SLA extension requests are subject to approval with brief motivation. • Enhance the pending status to recalculate the two-day unpend rule and review whether this should be extended to three days. • Remove unused statuses. • Review and update SLA clock for each status. • Review ticket re-opening activity, including instances where tickets reopen when users respond to system notifications. • Lock down the SLA window to allow selected administrators to amend, hold or release SLA.		
Incident and Service Requests	• Ability to create child tickets tasks for parent calls. • Service Desk must have the ability to recategorised tickets without losing the information on the additional fields sheet.		
Service Categories and Self-Service portal.	• Review all service categories, approvals and workflows, and amend where necessary. • Add or remove existing category requests. • Ability to view service announcements/notices. • Enable FIC authorised non-AD service provider users to request VPN access.		
System notifications	• Review all email notifications and update with relevant information. • Generate appointment email notifications and reminders.		
Knowledge Base	• Review and implement approval processes for knowledge base articles.		
Dashboards and Reports	• Review and correct faulty dashboards. • Create a dashboard for monthly reporting • Enhance existing reporting • Add new reports		

	• Clean up unused reports.		
Appointment scheduling	• Enable appointment scheduling integrated with Microsoft Outlook. • Enable appointment rescheduling.		
License Configuration	• Configure system license idle time.		

3.2. Additional Tenants

<i>Category</i>	<i>Functional Requirement</i>	<i>Bidder Compliant with Specification (Yes/ No)</i>	<i>Reference Page in proposal</i>
Additional tenants	• Onboard three additional divisions. • Initial assessment and planning sessions • Configure and customise each tenant according to its operational requirements. Each tenant may service internal stakeholders, external stakeholders, or a combination of both. • Each tenant will have first line service desk agents and support agents. • Enable access restrictions to specific data fields based on user login roles. • Ensure the solution can scale vertically to accommodate increased load and horizontally to support multiple locations or departments.		
HALO Licenses	• Three (3) fixed and two (3) floating additional licenses for the new tenants. • Licenses must be co-termed with the current licenses.		

3.3. Administration

<i>Category</i>	<i>Functional Requirement</i>	<i>Bidder Compliant with Specification (Yes/ No)</i>	<i>Reference Page in proposal</i>
System Administration	• Define the roles and responsibilities of the FIC and the service provider. • Provide foundational retraining and training on additional FIC administration responsibilities. • Review and update existing administration and process manuals. • Provide additional administrator training to the Application Support team on foundational HALO elements. ○ User onboarding ○ Report writing		

3.4. Public Query Process (PQP)

Category	Functional Requirement	Bidder Compliant with Specification (Yes/ No)	Reference Page/section in proposal
Enhance the Search functionality	- Develop the search functionality to source data using both new and old pqp references - Enable CAP officers to search using old and new pqp reference numbers. - Currently only CAP Quality Assurance can search using new pqp reference numbers using the search icon, which limits efficiency - Enable the search icon to be used to search both new PQP reference and old pep references		
Create a Search knowledge-based functionality	Develop a search knowledge base functionality, which enables a halo pqp user to search for queries completed previously, based on keys words, to enable viewing of old queries that dealt with similar topics		
Create a historic view of related Public Queries (PQP's)	When viewing a pqp, create a tab that shows all historic Public Queries (PQP's) received from the same recipient		
Enable a contact centre pqp halo capturing workflow	- When handling a call, the contact centre agent must capture a new halo query for record keeping, with the source being "phone" - This new call source query should have a space where the response given via phone call can be captured, - When creating, the query should not fall into the normal web query admin queue for allocation, but rather the call query should fall into its own separate queue, reflecting as closed. With the workflow ending there - Capturing a new query directly on the HALO		
Develop Workflow Design (Telephone)	- Ensure telephone queries are correctly routed to a phone query CAP workflow and automatically assign as the reported source as "phone". - A reference must automatically be populated once a new phone query is logged. - Telephone queries must have a response field and the ability to be resolved. - Telephone queries must not follow the same workflow as website queries.		
Create telephone query reports	- Currently there is no functional report indicating how many phone queries have been captured and by who and for a custom period. - Create a structured reporting for phone queries		
Create a level 2 category	- Create a level 2 category , - Currently there is a first category level that filters through from the FIC website, however, a second category within the halo platform only, is needed to enable accurate automated template to be assigned accurately to a query based on the subcategory - The first and second level categories should be able to be changed based on review		

	(reategorised) without losing the details of the query.		
Enable response templates based on level 2category	• Enable response template automated population in accordance with the selected level 2 category , chosen by CAP administrator. • The template must however be editable through subsequent changes by CAP Officers and CAP Quality Assurance		
Enhanced Not “Cap Related”	• Currently when designated a query as non-cap related, it is supposed to automatically be removed from the CAP administrator queue into a back end que. And the workflow ends		
Download option	• Currently in order to view a document attached to a query, you need to download it, this is inefficient • Enable a functionality where user can just click on the attachment and then a pop up appears for viewing, without having to download the document • Attachments should be able to just view in halo, and then only decide whether or not to save • In old system it used to be a pop up		
Download	• System must clearly indicate whether document attached is a document submitted with the query from the client versus whether the document is attached for sending out to the client by a user. • Clear audit trail as well		
Document attached by halo users should be submitted to client	• Ensure documents attached by CAP officer, CAP Quality Assurance, is actually sent out the client.		
Admin assigning (Total queries assigned per CAP administrator report)	• Develop a report showing total queries assigned per CAP administrator for a set period • Enable admin team to be able to see how many queries were assigned in that particular day, month, year or custom, per CAP officer (to have a view of who received how many).		
Status change notifications	• Cap officers should be notified when assigned a query.		
Closed queries	• Currently system allows CAP officers to close queries without the option to reopen (users do not receive a response)		
Bulk halo query response functionality	• Previously system had a bulk email response functionality, where similar queries could be responded to using a bulk email response template		
Spam query filtering	• Spam queries should be filtered out before they reach the allocation dashboard/queue		
Reporting accuracy (outstanding queries per cap officer report)	• Develop a report which details how many queries are outstanding within a custom date range: a difference of queries assigned to cap officers and completed (sent to CAP Quality Assurance)		
Enhance dashboard functionality	• Allow each CAP Quality Assurance to see the dashboard of queries closed in any given period		
Enhance categorization functionality	• Categorise each query in terms of subject – Registration, Reporting, RCR etc. and allow for grouping of same		

Category moved to a more visible area of the screen.	Can the category move to a more visible part of the screen, this is to ensure users can update accordingly. This also assists in reporting & statistics.		
Responding template	- Can the response templates be in-line with the category - Can the response be fully readable before selecting, so as users can select a response that is more appropriate.		
Reporting & Dashboards	- Ensure correct information mapping so that dashboard reflects correct statistics. - Dashboard outputs depend on incorrect mapping		
Data mapping	- Ensure correct data mapping of the information captured on the FIC website to the fields as per pqp halo. - Example - Currently categorization is not being filtered into the halo system		
Enhanced pqp reports	- Enhanced existing reports look and feel - Include tables indicating the amount completed/action per user (CAP administrator, cap officer, cap qc), per customizable period - Certain Completed queries report are missing - Ensure CAP ticket reporting is accurate - Allocation report corrected - Total queries completed - Total queries assigned by CAP administrator - report missing - Total queries outstanding per cap officer - pulling incorrect results - Duplicate CAP Quality Assurance reports identified - Legacy pqp reports not pulling through correctly		
Ensure correct Email address of receipts at all times	- Enhance system functionality to ensure Responses sent to correct recipients at all times - There must be no system rule that can result in a malfunction where responses are sent to incorrect recipients. - User detail must match at all times		
Enhance audit trail	Enhance ticket audit logs		
CAP Quality Assurance landing page should be initial query and response	- CAP Quality Assurance officers have to go to the additional fields tab to see the query and the response. - The layout of the query page is not user friendly, as the user has to toggle between various different tabs		
CAP Quality Assurance to have a template library	In some cases, the template used for the response is incorrect even though the data is. When updating a response in CAP QUALITY ASSURANCE the way to access default reply is not the best. There should be a default response library that is accessible outside of the draft response box.		
Draft response box to have a save button added	- The draft response box is not easy to type in, with one wrong click an entire draft message can be erased. - A save button should rather be added to save changes only when user is satisfied and not automatically save changes, as mistake changes result		
Option to link duplicate queries	In some cases, there are a number of duplicate queries, and one is not able to see the initial		

	query and response. The initial PQP ID should be noted and linked to the duplicate query.		
Dashboard accessibility	- Offers are unable to track the number of queries they have done in a day. - All Officers to have access to the dashboards or have a way of seeing how many queries they have done in a day		
PQP's to be categorised	PQP's to be categorised or make the categorisation mandatory when the public submits a PQP. This really helps with being able to see what the query is about.		

Please Note: Only Bids that comply **with all the technical specifications** / requirements will be considered for further evaluation.

3.5. Support Services

The appointed service provider shall provide support and maintenance services for a period of three years, annually renewable based on performance. These services shall include, but not be limited to, the activities listed below:

3.5.1 System Administration Functions:

- 3.5.1.1 Configure and update workflows in accordance with approved FIC requirements;
- 3.5.1.2 Provide data import assistance, where required;
- 3.5.1.3 Support capacity planning activities to ensure the solution remains fit for purpose;
- 3.5.1.4 Create and update service request definitions;
- 3.5.1.5 Conduct quarterly licence audits and provide related recommendations, where applicable;
- 3.5.1.6 Perform application performance tuning and optimisation;
- 3.5.1.7 Provide assistance with system upgrades and related configuration changes; and
- 3.5.1.8 Develop, amend and maintain reports as required by the FIC.

3.5.2 Enhancement Assistance:

- 3.5.2.1 Enhancement assistance refers to support for approved FIC requests managed through the FIC's change approval process. This may include, but is not limited to, report writing, new functionality, changes to existing functionality, upgrades, workflows, tasks, services, reports and service categories.

3.5.3 Incident and Problem Identification & Resolution

- 3.5.3.1 Provide support for incident and problem investigation, analysis and resolution, including recommendations to prevent recurrence where applicable.

3.5.4 Support Hours Required

- 3.5.4.1 The service provider must provide an allocation of fifteen (15) support hours per month, to be utilised by the FIC as required.
- 3.5.4.2 Unused hours for a given month must be carried over to the following month.

3.5.4.3 Unused hours may accumulate for a maximum period of three (3) consecutive months.

3.5.4.4 Where required and subject to prior agreement with the FIC, support hours may be utilised in advance from the following month's allocation.

3.5.4.5 The service provider must submit monthly timesheets and utilisation reports indicating the activities performed, hours used and remaining balance of available hours.

3.5.5 Service Meeting

3.5.5.1 The service provider must participate in bi-monthly service review meetings with the FIC to discuss support utilisation, outstanding issues, risks, service performance, improvement opportunities and any operational matters requiring attention

4. CONTRACT DURATION/COMMENCEMENT OF SERVICE

4.1. The appointed service provider will be required to commence with the provision of services, at the latest on **01 November 2026**. The final product must be delivered, completed, tested, documented, handed over and formally accepted by the FIC by **31 March 2027**.

4.2. The delivery of the final product must be completed in accordance with an approved project plan, which must be submitted by the service provider and approved by the FIC prior to implementation. The project plan must clearly indicate key milestones, dependencies, deliverables, timelines, testing activities, handover requirements and resource commitments.

PART E: EVALUATION PROCESS

1. EVALUATION PROCESS

1.1. All bids duly submitted will be examined to determine compliance with bid requirements and conditions. Bids with obvious deviations from the requirements or conditions will be eliminated from further evaluation.

1.2. Evaluation of bids received will be based on compliance with pre-selection (mandatory) requirements, compliance with scope of work and specifications, as well as price, and specific goals (B-BBEE status level of contribution).

2. PRE-SELECTION

Compliance with minimum and mandatory response requirements.

Supply Chain Management will do pre-selection on the following requirements:

No.	Item	Mandatory: Yes or No	Description or comments
1.	Central Supplier Database (CSD)	Yes	Bidders must be registered on the CSD that can be accessed via National Treasury website prior to submitting a bid – www.csd.gov.za . Bidders must submit a valid CSD registration report or indicate their CSD supplier number as proof.
2.	Valid B-BBEE certificate or sworn affidavit	No	Current or valid copy of a B-BBEE certificate issued by SANAS accredited BEE verification agencies or a sworn affidavit as prescribed by the BBBEE codes of good practice. Failure of a bidder to provide a valid B-BBEE certificate or sworn affidavit will forfeit points for specific goals.
3.	Standard bidding document: SBD 1 form – invitation to bid	Yes	Failure to complete, sign and submit SBD 1 form will result in disqualification.
4.	Standard bidding document: SBD 4 form – bidders disclosure	Yes	Failure to complete, sign and submit SBD 4 form will result in disqualification.
5.	Standard bidding document: SBD 6.1 – preference points claim form	No	Failure to complete, sign and submit SBD 6.1 form will result in points being forfeited for specific goals.

6.	OEM accreditation	Yes	Bidders must be accredited HALO implementation delivery partners. Attach a valid proof of accreditation
7.	Pricing Proposal/ Pricing Schedule	Yes	Completed pricing proposal / pricing schedule in accordance with the provided format.

- a) A bidder who fails to comply with mandatory requirements **1, 3, 4, 6 and 7** will be disqualified from the evaluation process.
- b) A bidder who fails to comply with requirements **2** and **5** will forfeit preference points for specific goals or B-BBBEE points.

3. EVALUATION: TECHNICAL SPECIFICATION/SCOPE COMPLIANCE

- 3.1. All remaining bids which have complied with the pre-selection criteria will be evaluated on technical specifications compliance, in accordance with the scope of work above (**section 3.1 to 3.4**) under part D: Terms of Reference.
- 3.2. Only bids that fully comply with the technical specifications and scope of work will be evaluated further on price and specific goals in terms BBBEE status level contribution.

4. PRICE AND SPECIFIC GOALS EVALUATION

- 4.1. The following criteria 80/20 will be used for the evaluation of the proposals:
- 4.1.1. Pricing: 80 points
- 4.1.2. Specific goals: 20 points

5. PREFERENTIAL POINT SYSTEM: PRICE AND SPECIFIC GOALS (B-BBEE)

- 5.1. Only qualifying bids will be evaluated further in terms of the 80/20 preference points system, whereby 80 points will be for price only and 20 points for preference points based on specific goals as set out in the preference point claim form.

- a) The percentage scored for price shall be calculated as follows:
- b) A maximum of 80 points is allocated for price on the following basis:

80/20

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of quotation under consideration

P_t = Rand value of quotation under consideration

P_{min} = Rand value of lowest acceptable quotation

5.1.1 Awarding of points for broad-based black economic empowerment (B-BBEE) status level of contribution:

- a) Preference points for B-BBEE status level of contribution will be awarded according to the table indicated in the preference points claim form- SBD 6.1.

6. ADJUDICATION

6.1. The relevant award structure will consider the recommendations and make the final award.

The successful respondent will usually be the service provider scoring the highest number of points or it may be a lower scoring provider on justifiable grounds or no award at all.

6.2. The FIC has the right to negotiate with a prospective contractor regarding any terms and conditions, including the price(s), of a proposed contract.

7. PRICING SCHEDULE

7.1. The tables below must be used to indicate the cost of the required deliverables.

7.2. Bidders must provide details of any additional costs associated with the required deliverables.

7.3. Bidders are required to use the following templates as part of their pricing schedule to clearly define the deliverables and related costs in line with their project plan.

A. Pricing Template 1 - Enhancements

Deliverable	Total Price (Including VAT)
Initial Assessment	
Planning and definition of strategy	
Implementation	
Testing	
Handover and Training	
Total Price (Including VAT)	R

7.4. The pricing must also include the additional new licenses, which are to be co-termed with the existing licenses going forward.

7.5. The current licenses expire on **31 October 2026**. The current licenses are required to be renewed before the expiry date, and new or additional licenses must be co-termed to align with the existing ones.

B. Pricing Template 2 - Licensing and Support and Maintenance Services

Deliverable	Total Price Year 1 (Including VAT)	Total Price Year 2 (Including VAT)	Total Price Year 3 (Including VAT)
Existing Licenses: Named (Fixed): 11 Concurrent (Floating): 23			
Additional Licenses Named (Fixed): 3 Concurrent (Floating): 3			
Support and Maintenance			
Total Price (Including VAT)	R	R	R

C. Total Bid Price:

Description	Total Price (Including VAT)
Total price for the Enhancements as per Template 1 above:	R
Total price for the Licensing, Support and Maintenance Services for year 1, year 2, and year 3 as per Template 2 above:	R
TOTAL BID PRICE INCLUDING VAT	R

8. VALIDITY PERIOD OF PROPOSAL

8.1. Validity period from date of closure is 90 days.

8.2. Offers provided on this document will be valid for the duration of the contract entered into with the successful bidder.

8.3. Bidders may be requested to extend the validity period of their proposal for a specified additional period. In such instances, bidders will not be allowed to change any aspect of their submissions, unless they are able to demonstrate that the proposed change(s) is as a direct and unavoidable consequence of FIC's extension of the validity period.

PART F: STANDARD BIDDING DOCUMENTS OVERLEAF (SBD 4, SBD 6.1)

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 system is applicable to invitations to this tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included);

1.2 **To be completed by the organ of state**

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

- 1.3 Points for this shall be awarded for:

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

- 1.4 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 FIC requires of a tenderer to substantiate any claim in regards to preferences, by submitting their current/valid B-BBEE certificate or a sworn affidavit as prescribed by the B-BBEE codes of good practice.

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) “**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 PREFERENCE POINT SYSTEMS

A maximum of 80/20 points is allocated for price on the following basis:

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

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

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 2022, 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 that shall be supported by proof / documentation as stated in the conditions of this tender:

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
The B-BBEE Certificate is used as a measurement instrument for FIC's specific goals:	20 Maximum	
B-BBEE Status level of contributor: 1	20	
B-BBEE Status level of contributor: 2	18	
B-BBEE Status level of contributor: 3	14	
B-BBEE Status level of contributor: 4	7	
B-BBEE Status level of contributor: 5	4	
B-BBEE Status level of contributor: 6	2	
B-BBEE Status level 7 – 8 and non-compliant contributors	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2. Name of company/firm.....

4.3. Company registration number:

4.4. 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]

4.5. 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:	
	
	
	