INVITATION TO SUBMIT A PROPOSAL FOR REQUIREMENTS OF THE SOUTH AFRICAN BUREAU OF STANDARDS (SABS)

RFP NUMBER: 201566

DESCRIPTION: Implementation of an end-to-end automated Certification Information Management System (CIMS)

CLOSING DATE: 10 December 2024

CLOSING TIME: 11:00am

Publication date: 15 November 2024

THE FOLLOWING PARTICULARS MUST BE FURNISHED **(FAILURE TO DO SO MAY RESULT IN YOUR PROPOSAL BEING DISQUALIFIED)**

NAME OF BIDDER				
POSTAL ADDRESS				
STREET ADDRESS				
TELEPHONE NUMBER	(CODE)		(NUMBER)	
FACSIMILE NUMBER	(CODE)		(NUMBER)	
CELLPHONE NUMBER				
E-MAIL ADDRESS				
VAT REGISTRATION NUMBER				

NAME OF AUTHORISED PERSON	
SIGNATURE OF BIDDER	
CAPACITY UNDER WHICH THIS BID IS SIGNED	
DATE	

1. Intent

The South African Bureau of Standards (SABS) is inviting experienced and reputable (Suppliers) Bidders to submit proposals for Implementation of an end-to-end automated Certification Information Management System (CIMS).

2. Confidentiality

This document may not be used for any purpose by the Bidder other than for developing their response to it, and all reasonable efforts must be taken by the Bidder to ensure confidentiality of any information provided. This document and any other information of a confidential nature provided to the Bidder during the Request for Proposal (RFP) process are to be covered by the non-disclosure agreement signed between the SABS and the Bidder.

3. Procedural compliance

3.1 Intent to respond

An interested Bidder is required to advise the SABS of its intention to submit a proposal by completing and returning the "Intention to Respond" form (Appendix B) no later than **10 December 2024**. Should a party decide not to respond to this RFP, you are requested to continue to treat the information as confidential in perpetuity.

3.2 Responsibility for costs

Under no circumstances shall the SABS accept any responsibility whatsoever for any of the Bidder's costs associated with the preparation and/or submission of its Bid/Proposal, including any costs incurred by the Bidder prior to the signature, by both parties, of an agreement resulting from a successful bid.

3.3 Amendments to the RFP

Amendments to this document shall only be effective if agreed by the SABS and confirmed in a written addendum to the RFP. The SABS reserves the right to modify the scope of this document at any time prior to and after the award of the tender.

3.4 Delivery of proposals or bids

The Bidder is responsible for ensuring that the Bid/Proposal is submitted and delivered on time to Tenders.Prince@sabs.co.za . The SABS undertakes that the Bids/Proposals shall be stored in a secure place, opened at the same time and not before the deadline for submission.
Note: The above email address should only be used for submission of proposals. No clarity seeking questions should be send to this email address. (see 4.2 below)

3.5 No obligation to proceed

The SABS reserves the right to discontinue the RFP process at any time prior to the formation of the envisaged agreement and will give written reasons for the cancellation upon written request to do so. The SABS, its subsidiaries, shareholders, advisors, directors, employees, representatives including the SABS Representative shall not be liable for any losses, claims or damages of whatsoever nature or howsoever arising that may be sustained by a Bidder or any other person as a result of its participation or any amendment, termination or suspension of the process set out in this RFP or its exclusion from participating in the tender process at any point. It is an express term that SABS shall in no way be liable for any indirect/consequential damages, loss of profits, etc. suffered by the Bidder during the RFP process, award, negotiating and/or contracting phase.

After any cancellation of the tender process or the rejection of all tenders due to non-compliance with the thresholds, SABS may abandon the proposed work and services, have it performed in any other manner, or re-issue a similar invitation to tender at any time.

3.6 No contract

Bidders shall note that this RFP does not commit the SABS to any course of action resulting from the receipt of Bids/Proposals and the SABS may, at its discretion, reject any Bid/Proposal that does not conform to instructions and specifications that are contained herein or select a Bidder based upon its own unique set of criteria. SABS also reserves the right not to select a Bidder/award the tender. The SABS does not become bound by any obligations prior to the signature, by both parties, of an agreement - to be negotiated, resulting from a successful bid.

Nothing in this document shall be construed as a contract between the parties and no communication, whether verbal or written, by the SABS personnel or agents during the course of this process shall create such a contract in respect of the requirements specified in this RFP.

SABS shall not be liable for any fees incurred due to any work done/services performed by the Bidder prior to signature, by both parties, of an agreement resulting from a successful bid.

3.7 Validity of proposals

The proposal shall remain valid for a period of one hundred and twenty (120) days from the submission date, where after such proposal expires. SABS retains the right, but is under no obligation, to request Bidders to extend the validity periods of their proposals, prior to expiry thereof. Such request, if any, shall be in writing. The Bidder is not obliged to extend the validity period.

3.8 Intellectual Property

The Bidder undertakes that the SABS retains ownership of all Intellectual property rights on all material and processes developed that relate to the service provided for and on its behalf by the Bidder. The Bidder undertakes to transfer all said Intellectual Property Rights, whether registered and / or unregistered, to the SABS, including undertaking to sign all forms necessary to affect such transfer.

4. General Instructions

4.1 Assumptions

The SABS has endeavoured to provide sufficient guidance to inform Bidders' Bids/Proposals. However, it may be necessary to make some assumptions. Where assumptions have been made these must be documented in the Bid/Proposal. The SABS accepts no responsibility for assumptions made by the Bidder.

4.2 Requests for clarification/additional information

Requests for additional information, questions or issues fundamental to the quality or clarity of the response should be submitted using the 'Request for Proposal Enquiry' (Appendix N). Additional information will be provided at the discretion of the SABS. The SABS also reserves the right to provide the same information to all other interested Bidders.

4.3 Contact information

All enquiries regarding this RFP must be e-mailed to prince.hlongwane@sabs.co.za. Bidders must not contact any other SABS personnel regarding this RFP as this may lead to disqualification of the bid. Also note that any canvassing by Bidders regarding this RFP will result in disqualification.

4.4 Timescale

The proposed timescales for the RFP process are indicated below.

Item	Milestone	Date
1	Date of RFP advertisement	15 November 2024
2	Appendix C, Non-disclosure Agreement /Confidentiality Undertaking signed and submitted	10 December 2024
3	Appendix B, Intention to respond released and submitted	10 December 2024
4	Final Date for Bidders to submit consolidated requests for clarification (Questions) Questions to be send to Prince.Hlongwane@sabs.co.za	25 November 2024
5	SABS clarification. (Not further clarification after this date)	28 November 2024
6	Proposal Submission Date Proposals to be send to Tenders.prince@sabs.co.za	10 December 2024
7	Evaluation of proposals	12 – 16 January 2025
8	Presentations/Demonstrations	TBA
9	Awarding of Tender (Next TC seating)	TBA

4.5 Management summary

This section should be submitted as a separate document. The information to be provided in the Management Summary shall include, but not be limited to the following items

- Company profile
- Completed 'Statement of compliance' (Appendix K)

4.6 Presentations

The SABS reserve the right to request bidders to present for clarification.

4.7 Clarification and inspections

The SABS may submit clarification in writing on specific tender aspects to obtain a better understanding of the received bid/s. This may also include possible inspections of the Bidder's premises at an agreed upon date and time.

4.8 Submitting a response

4.8.1 Due date

- Proposals/ Bids are to be submitted by closing date and time as stipulated on page 1.
- Proposals/ Bids must be submitted **electronically** to Tenders.prince@sabs.co.za indicating the tender **reference number** and **description** **on the subject**. **Maximum size must be 14MB.**
- Proposals/ Bids must be submitted on **PDF Files** (compressed zipped folder if necessary).
- Proposals/Bids submitted **via a link and/or "we transfer"** **will not be accepted.**

- The responsibility for on-time submission rests entirely with the Bidders.
- **Late submissions will NOT be accepted.**
- **The above email address should only be used for submission of proposals. No clarity seeking questions should be send to this email address.**

4.8.2 Proposal format

Each proposal shall include a detailed description of the Bidder's capabilities with regard to the requirements set out in **Appendix A and Section 5.3** of the Mandatory Evaluation.

4.8.3 Central Supplier Database (CSD) Registration

Service providers and suppliers who wish to render services to SABS will no longer register at SABS directly. Suppliers will have to register on National Treasury Central Supplier Database (CSD) as per National Circular No 3 of 2015/6 – Central Supplier Database;
National Treasury will maintain the database for all suppliers for Government and its institutions; and All existing and prospective suppliers are requested to register on the CSD by accessing the National Treasury website at www.CSD.gov.za.

5. Evaluation

5.1 Returnable documents

Bidders must provide the following administrative compliance documents.
[TICK APPLICABLE BOX]

NO	APPENDIX	TICK
1	Appendix A Tender Requirements/ Scope of Work	
2	Appendix B Intention to Respond	
3	Appendix C SBD 4 Bidder's Disclosure	
4	Appendix D Signed Non-disclosure agreement	
5	Appendix E SBD 6.1 Preference points claim form in terms of the Preferential procurement Regulation 2022	
6	Appendix F Signed SABS Terms & Conditions	
7	Appendix G CSD Report / Proof of banking details for international suppliers	
8	Appendix H BBBEE/ Sworn affidavit	
9	Annexure I Quotation/ Fixed Rate	
10	Appendix J Management Summary (including Statement of Compliance)	
11	Appendix K Statement of Compliance	
12	Appendix L Page 2 of the RFP Document	
13	Appendix M Audited Financial Statements	
14	Appendix N Request for Proposal Enquiry	

5.2 Disqualifying criteria is as follows:

- Bidders who do not meet all the requirements as specified on the RFP document scope of work will not be evaluated any further.
- Bidders whose solution is encumbered by any Intellectual Property rights, whether registered and / or unregistered, including but not limited to Copyrights, Patents, Know-How, Registered Designs, Trademarks, Trade Secrets and the like, will not be considered for award of the bid.
- Bidders who make a misrepresentation on the above 2 points or any other material fact.

5.3 Tender Evaluation Process

5.3.1. Mandatory requirements

- The bidder must be an accredited partner/ reseller of the proposed product – A valid OEM letter indicating such a partnership or ownership for the proposed product must be submitted.
- The bidder must submit proof of footprint (Support office/s address on company letterhead) in South Africa.

Bidders who met the mandatory requirements will be evaluated further on functionality.

5.3.2. Evaluation on Functionality

Selection Criteria	sub criteria	Sub weight	Weight
Values:0 = very poor, 1 = poor; 2 = Average; 3 = Good; 4 = Very Good; 5 = Excellent			
Methodology with a detailed project plan			30%
The bidders should have the capacity and resources to carry out the proposed work according to the SABS proposed timelines. A project plan with a scope of work and a proposed implementation approach will be required.	No project plan	0	
	Project plan	1	
	Project plan align to implementation approach.	2	
	Project plan align implementation approach, skills transfer plan	3	
	Project plan align implementation approach, skills transfer plan and identifying project risks.	4	
	Project plan align to timelines, implementation approach, skills transfer plan and identifying project risks with mitigation measures.	5	
Resources			40%
Bidders must provide details of key personnel with a comprehensive CV	Technical lead only	0	

Selection Criteria	sub criteria	Sub weight	Weight
Values:0 = very poor, 1 = poor; 2 = Average; 3 = Good; 4 = Very Good; 5 = Excellent			
indicating qualifications and experience and should include details on pervious work carried out by the applicable staff member, including ongoing assignments indicating capability and capacity to undertake the projects in relation to the scope of work, demonstrated clearly on CVs: All personnel to have a relevant experience and qualifications as highlighted below. Experience of project manager assigned to the project- implemented similar projects (Professionally registered PMP / Prince2 practitioner /Scrum master) Experienced IT Business Analyst/ Business Systems Analyst who will examine, confirm, and validate all business requirements outlined by the SABS. A Subject Matter Expert/Technical Lead experience completed similar projects as business analyst or system architect- 10 years proven experience. Experienced Senior Developer with proven 10 years CIMS Implementation, Migration, Support and Maintenance. Team members must have three (3) years or more experience of CIMS Implementation, Migration, Support and Maintenance. All to have relevant qualifications proposed team must include a qualified software tester or quality assurance personnel, Integration Specialist, DBA and Change Manager/Trainer.	Technical lead plus one team member	1	
	Technical lead plus two team members	2	
	Technical lead plus three team members	3	
	Technical lead plus four team members	4	
	Technical lead plus five team members and more	5	
Experience and Track record			
Provide contactable reference from other clients (not older than Seven (7) years), where CIMS implementation, support	less than 1 Reference Clients	0	30%
	1 Reference Clients	3	

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Selection Criteria	sub criteria	Sub weight	Weight
Values:0 = very poor, 1 = poor; 2 = Average; 3 = Good; 4 = Very Good; 5 = Excellent			
and maintenance were successfully rendered. Company must have rendered service not more than seven (7) years ago. The contactable reference should include the following: Brief description of services rendered, Duration of contract, Company address and contact details,	2 Reference Clients	4	
	3 Reference Clients	5	
Minimum threshold is 75%			100%

Bidders who meet the minimum threshold of 75% on functionality will be evaluated further on the 80/20 preference point system.

5.4 Preferential point system – Pricing and SPECIFIC GOAL

Only Bidders who submitted quotations as per scope of work and met mandatory requirements will be evaluated further on 80/20 preference points system of 2022. (Pricing and **SPECIFIC GOAL**)

6. Feedback on Proposals

Once the recommendation to the Bid Adjudication Committee has been approved, the successful and unsuccessful bidder(s) will be notified in writing. Successful bidder/s will be issued with a notification letter. Such notification does not constitute an agreement. The award is wholly subject to the successful Bidder entering into a duly signed contract with SABS.

7. Contracting

Successful bidder(s) will be required to enter a contract with the SABS. A formal Agreement will be signed with the successful bidder and SABS further reserves the right to amend, alter or delete clauses relating to, but not limited to insurance, indemnity, undertaking, guarantees, Intellectual Property, service levels and / or tax compliance.

SABS shall not be liable for any costs expended by the bidder prior to any formal agreement being signed. **It is therefore imperative that NO SERVICES are rendered prior to the formal agreement becoming effective.**

C3.1: SCOPE OF WORK

SOUTH AFRICAN BEREUA OF STANDARD

PROJECT MANAGEMENT OFFICE

THE APPOINTMENT OF THE SERVICE PROVIDER FOR THE PROVISION OF A TURNKEY SOLUTION, (SCOPE DEFINITION, DESIGN, DEVELOPMENT, DEPLOYMENT, TESTING, SUPPORT AND TRANSFER OF SKILLS) FOR THE SUCCESFUL IMPLEMENTATION OF THE SABS CERTIFICATION INFORMATION MANAGEMENT SYSTEM (CIMS).

1. Project purpose

The South African Bureau of Standards requires the services of appropriately qualified and skilled service provider to provide a turnkey solution for the design and development of the Certification Information Management system (CIMS). This project aims to:

- To transform and empower the Certification Division by leveraging world-class technology to deliver a digitally enabled ecosystem.
- To improve operational efficiencies current business models, functional capabilities, and business procedures.
- To enable the new digitally aware business models by utilizing digital sound platform to automate a greater portion of the division's end-to-end value stream.
- To address the division's ongoing challenges with long turnaround times, inadequate quality delivery, and lack of communication, low productivity and high inefficiency that have been experienced by several stakeholders; and
- Will play a major role in the division's turnaround strategy which aims to improve revenue and profitability, customer experience and stakeholder engagement, internal processes (productivity and efficiency) and empower employees.

2. Background

The South African Bureau of Standards (SABS), as per the Digital Transformation Strategy, aims to leverage technology to enhance its competitiveness and innovation. The organization aims to improve overall operational efficiency and customer service by implementing state-of-the-art solutions that comprehensively support business objectives. To achieve this goal, the SABS Certification division is in the process of optimizing its core business processes.

The Certification division consists of the following sectors:

- System Certification:

Certification of management systems is a third-party conformity assessment activity. Management System Certification includes, but is not limited to, standards such as ISO 9001, ISO 45001, ISO 14001, and Food Safety Management Systems.

- Product Certification:

Certification of products, processes, or services is a means of assuring that they comply with specified requirements in standards and other normative documents. This includes product testing and inspection together with an assessment of the client's management systems.

- Consignment Inspection:

Consignment inspection involves professional judgement to determine product or service acceptability against specified requirements.

- Local Content Verification:

Local Content at the South African Bureau of Standards (SABS), as per the directive received by the Department of Trade, Industry, and Competition, is tasked with the critical responsibility of verifying and grading services and products based on their local content, aligning with the relevant government policies and regulations. Local Content plays a crucial role in ensuring compliance with local content regulations and supporting the promotion of locally produced products.

- Local Content Grading Scheme
  - The Local Content Grading Scheme, which provides a source for procuring corporations and individuals to make informed decisions when purchasing products based on the level of local content achieved. The scheme is open to all suppliers in the market who want to verify their products for local content and maintains a database of verified products, helping manufacturers market their products to consumers who want to support the local economy.
  - A Local Content Verification certificate is issued by the SABS certifies that a supplier has adhered to legislative requirements in terms of Local Content. It also confirms that the supplier is committed to promoting local employment and contributing to economic growth in South Africa. It can also enable suppliers to achieve stage 1 compliance with the Preferential Procurement Policy Framework Act (PPPFA) act 5 of 2000.

- Vehicle Testing Service:
  - Vehicle test station inspection on behalf of the Department of Transport (DoT).

Certification tasks include audit planning and scheduling, pre-permit audits, surveillance audits, re-certification audits, and issuing of certificates (this is a function of the Accreditation business unit).

Local Content Verification tasks include initiation (i.e., expression of interests, pre-verification review and, invoicing), scheduling (i.e., verification audit scheduling), execution (i.e., financial verification audit, and technical verification audit), review reporting, and generation of certificates.

In a bid to optimise their business process, the SABS aims to acquire the services of a reputable service provider that can implement an end-to-end automated Certification Information Management System (CIMS) that will improve overall operational efficiency, consistency, and data accuracy within the System Certification, Product Certification, Consignment Inspection, and Vehicle Testing Service business units. Included within the Certification Information Management System shall be a module that comprehensively supports the Local Content Verification business processes and improve overall operational efficiency, consistency, and data accuracy within the Local Content business unit.

The elected software solution (whether commercial or bespoke) must enable the SABS to effectively comply with

- ISO/IEC 17021-1:2015 Conformity Assessment — Requirements for bodies providing audit and certification of management systems
- ISO/IEC 17065:2012 Conformity Assessment — Requirements for bodies certifying products, processes and services
- ISO/IEC 17029:2019 Conformity Assessment — General principles and requirements for validation and verification bodies
- ISO/IEC 17020:2012 Conformity Assessment — Requirements for the operation of various types of bodies performing inspection.

The acquired solution must be developed to align with the business requirements outlined within the Business Requirements Document and the target (i.e., TO BE) business processes. (NB: It is important to note that there is an ongoing Business Process Reengineering & Mapping whose outputs will inform the implementation of the proposed Certification Information Management System).

The proposed system needs to integrate with business applications within the SABS information technology environment such as, but not limited to, Customer Relationship Management (CRM), ERP, Financial system, Website, SABSTan, and the Laboratory Information Management System (LIMS).

Description of the Services/ Scope of Work

The SABS project management office seeks to appoint a service provider for the provision of a turnkey solution (Scope definition, Design and development, deployment and testing, support and training of SABS employees) for a certification information management system software (CIMS) with the following high level functionalities but not only limited to the below listed.

- Onboard new clients by online completion of the application and uploading of required documentation either by client or the sales and business development team on behalf of the client.

- Application review to determine the feasibility to continue.
- Produce quotation based on correctly calculated audit man days, traveling costs and testing costs.
- Provides functionality for certification agreements, aligned to the specific scheme (product or system) the client has applied for to be updated and shared with applicants who accepted SABS Certification quotations.
- Provides functionality to incorporate the SABS Account application for new clients, who will require to have an SABS ERP System Account created, and channels this request to the appropriate finance officer within SABS for action
- Allow existing clients to apply for addition, amendment or removal of products and services from their portfolio.
- Allow amendments of client details which do not impact on certification documents.
- Any addition, amendment or removal may not lead to quote or requote, necessitate audit planning, reissue certificate, and schedule.
- Keep record of client communications.
- Keep track of financial status.
- Management System, mark, consignment inspection, vehicle testing station and local content clients. Record client product commodity types, brands and sites. Client's cancelations, suspension requests. Key account Officer / Supervisor communication plan.
- Provides functionality to have client data sheet record created, for applicants whom accept the SABS certification quotation, specifically for new customers
- Keep all client and product information required in order to perform the relevant product services. This includes Management System clients, Mark scheme clients, Inspection clients and their suppliers, VTS clients and Local Content Clients and their suppliers.
- Ability to create and maintain all the Certification products. The product can be linked to one or a combination of standard and should keep all product requirements (including clauses or other relevant requirements)
- It should also include products for VTS, LCV and Consignment Inspection.
- Be able to track the product validity and allow for transition planning.
- Be able to track standards updates and allow initiation of Cluster Technical Committee resolutions, specific permit condition updates, action plans to transition certificates.
- Product cycles and audit/intervention types and frequency must be defined for each product, including samples for testing.
- Record and maintain the accreditation status on products. Maintain industry classification codes (EA, NACE, cat codes) related to the product.
- The product information will be input to the audit program and SPC

- Create and amend audit program per client sites, and client's processes per cycle. Keeping track of all audits and interventions. Adjust based on auditor's report and feedback.
- Do planning based on SPC and audit program and assign competent audit team.
- Be able to do route planning.
- Plan samples in line with CLIENT SPECIFIC SPC (sampling annex).
- Allow clients to upload evidence related to corrective action taken to address none conformity (NC's).
- Allow complaints, dispute and appeals from client.
- Link received consumer concerns to certified client's profile
- This must cater for handling of none conformity for Management System, Mark Scheme, Consignment Inspection, VTS, LCV and Internal Audits.
- Final decision for issue, reissue, amendment, cancellation, suspension. Certificate and or schedule generation electronic and hard copy printing or reprint. Append a digital signature to a certificate. Certificate Information to be linked to website. Distribution of printed certificates, keeping track of delivery
- Send PAIR to client to verify audit information of audit if not unannounced audit or inspection.
- Generate audit plan and send to client if not unannounced.
- Travel planning
- Generate necessary sample documentation.
- This must cater for execution of all audits and interventions for Management System, Mark Scheme, Consignment Inspection, VTS, and Internal Audits
- Allow for revision and approval of the plan as per audit programme.
- Record audit trail, photos, indicate non-conformances, comments.
- Generate audit or recommendation report.
- Track sample and testing status, upload test reports, resampling or retesting, dispute of test report.
- Feedback as input to audit program and sampling plan.
- Track NC's and act depending on severity.
- Might need request for suspension or planning for revisit.
- Constant review of processes, SLA breaches, interventions required, additional inputs from competent resources throughout process.

The expectation is:

- To design and develop an automated system, remove duplication and integrate with all support systems that maintain the certification and accreditation processes.
- To ensure mandatory activities are performed and controlled with relevant records that are maintained at specific level of the business,
- To reduce unnecessary workflow authorizations.

- To interface or integrate with other SABS software including the enterprise resource planning modules.

Business Objectives

Business Objective	Description
Utilise Audit Program	To utilize an updated audit program, This process is initiated by technical reviewer/team leader, and always updated by Auditor, i.e. this serves as an input when planning for an audit.
Monitor resource competency and availability	To filter an updated list of resource/s that are competent for a specific scheme
Monitor Decision Making competency and availability	To filter an updated list of lab/s that are competent for a specific scheme, To list LSD testing capability and capacity for requested certificate scope.
Manage Work Order	To create work order and update work order, To verify work order and approve or reject.
Manage and Audit Plan	To create audit plan order and update audit plan, To verify audit plan and approve or reject.
Manage Sampling Plan	To create sampling plan and update sampling plan, To verify sampling plan and approve or reject.
Monitor audit and sampling plan	To monitor and track the progress on the audit and sampling process
Report audit and sampling reports and dashboard	To create enterprise system view summary dashboard of all registered and acting applications, progress status, indicate overall delays, Cancellations, Sales ,revenue. To draw summary reports
Query Customer Planned/ Past Audits	To view customer site information, including history/ planned audit information.
Manage Sample Test Demand Plan	To create sample test demand plan and update sample test demand plan, To track sample tests and access recorded sample test report.
Monitor scope of certification sector/industry	To list competences of SABS scope of certification sector/industry, Alerted to newly mandated scope of certification that SABS is competent
Manage certification	To record final decision for issue, reissue, withdrawal amendment, cancellation, and suspension, To secure and safekeep certificate.

Manage finances	To improve client financial information maintained in financial system, To query/import client account information from financial system.

The service provider shall carry out the scope of work in line with the SABS project lifecycle model as per the below:

Prior to the commencement of any development activities, the service provider, in collaboration with the South African Bureau of Standards (SABS) cross-functional implementation team, shall undergo a comprehensive process of solutioning or, system analysis and design. This process aims to thoroughly examine, confirm, and validate all business requirements outlined by the SABS's Certification division in the respective Business Requirements Specification(s).

The SABS reserves the right to request revisions or clarifications on the solutioning and system design documentation. The contracted service provider shall address any feedback or queries promptly.

Final approval will be granted upon the satisfaction of the SABS stakeholders with the completeness, accuracy, and alignment of the solutioning and system design documentation with the organization's requirements.

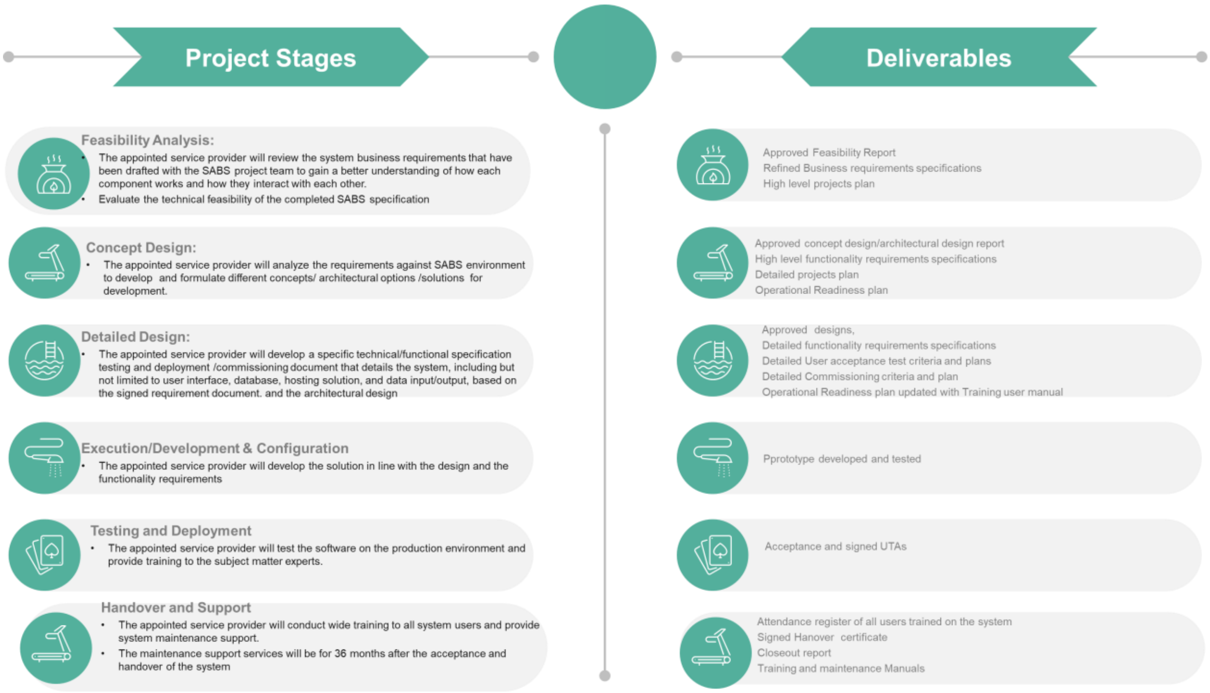

Figure1: Project Stage Gate Model-Certifications Information Management Systems.

3. Certification Information Management System Solutioning & Design

Prior to the commencement of any development activities, the service provider, in collaboration with the South African Bureau of Standards (SABS) cross-functional implementation team, shall undergo a comprehensive process of solutioning or, system analysis and design. This process aims to thoroughly examine, confirm, and validate all business requirements outlined by the SABS's Certification division in the respective Business Requirements Specification(s).

3.1. Needs Analysis

The appointed service provider will review the system business requirements that have been drafted with the SABS project team to gain a better understanding of how each component works and how they interact with each other.

Additionally, they will evaluate the technical feasibility of the completed SABS specification.

Deliverable (not limited to): System Requirements Document (To be reviewed and **signed** by both SABS and the contracted vendor)

3.2. System Design

The appointed service provider will develop a specific technical/functional specification document that details the system, including but not limited to user interface, database, and data input/output, based on the signed requirement document.

Deliverable(s): System Design document (e.g. Functional Requirements Specification document and architectural design documents)

The service provider shall develop an array of supporting documentation based on the validated business requirements specification. This documentation shall include, but not be limited to:

3.3. Functional Requirements Specification:

A detailed documentation outlining the functionalities and features of the Certification Information Management System (CIMS), including the operations and interactions of each module within the system.

3.4. Data Model(s):

Documentation outlining the structure and relationships of the data within the proposed Certification Information Management System (CIMS).

3.5. User Interface/User Experience (UI/UX) Design:

Visual representations and descriptions of the user interface, ensuring a user-friendly experience aligned with industry best practices and organizational requirements.

3.6. Database Design:

Documentation detailing the design and structure of the proposed Certification Information Management System (CIMS) database design.

3.7. System Architecture Design:

An overview of the proposed system architecture, illustrating the relationship between various components, modules, and interfaces. This shall include integration points with existing systems, if applicable, and a framework for data exchange between the proposed Certification Information Management System (CIMS) and other organizational tools within the SABS.

The documentations serve as a critical component for the successful implementation of the Certification Information Management System (CIMS). It provides detailed insights into the architecture, modules, functionalities, and integrations for the proposed system.

Upon completion of all the supporting solutioning and system design documentation, the contracted service provider shall submit the deliverables to the SABS for review and approval. The approval process will involve a thorough assessment by designated stakeholders within the SABS, including representatives from the Certification Division, ICT & Knowledge Management teams, and other relevant parties.

The SABS reserves the right to request revisions or clarifications on the solutioning and system design documentation. The contracted service provider shall address any feedback or queries promptly.

Final approval will be granted upon the satisfaction of the SABS stakeholders with the completeness, accuracy, and alignment of the solutioning and system design documentation with the organization's requirements.

3.8. Development & Configuration of Certification Information Management System (CIMS)

Certification tasks include audit planning and scheduling, pre-permit audits, surveillance audits, re-certification audits, and issuing of certificates (this is a function of the Accreditation business unit).

Local Content tasks include initiation (i.e., expression of interests, pre-verification review and, invoicing), scheduling (i.e., verification audit scheduling), execution (i.e., financial verification audit, and technical verification audit), review reporting, and generation of certificates.

Consignment Inspection basic activities is to enable creation of inspection plan order and update inspection plan, updated list of resource/s that are competent for a specific scope of consignment inspection, create sampling plan and update sampling plan, record final decision for issue, reissue, withdrawal amendment, cancellation, and suspension, to secure and safekeep certificate, improve invoicing of customer via the SABS financial system, and query/import customer account information from financial system.

Therefore, the contracted service provider is tasked with **developing, configuring, or customization** of the Certification Information Management System software as per the examined, confirmed, and validated business requirements and functional requirements specification (FRS) documents outlined by SABS.

The proposed Certification Information Management System (CIMS) must be capable of supporting the operations of each of the following: System Certification, Product Certification, Consignment Inspection, Vehicle Testing Service, and Local Content business processes and improve overall operational efficiency, consistency, and data accuracy within the Local Content business unit.

The proposed Certification Information Management System (CIMS) must enable the SABS to effectively comply with:

- ISO/IEC 17029:2019 Conformity Assessment: General principles and requirements for validation and verification bodies.
- ISO/IEC 17021 (and different Part standards linked to it): Conformity assessment - Requirements for bodies providing audit and certification of management systems.
- ISO/TS 22003: Food safety management systems - Requirements for bodies providing audit and certification of food safety management systems.
- ISO 22003-1: Food Safety - Part 1: Requirements for bodies providing audit and certification of food safety management systems.
- ISO 22003-2: Food Safety - Part 2: Requirements for bodies providing evaluation and certification of products, processes and services, including an audit of the food safety system.
- ISO/IEC 27006: Information technology - Security techniques - Requirements for bodies providing audit and certification of information security management systems.
- ISO 50003: Energy management systems -- Requirements for bodies providing audit and certification of energy management systems.
- FSSC 22000: FSSC 22000 Scheme Food Safety Management System Certification.
- ISO/IEC 17065: Conformity assessment - Requirements for bodies certifying products, processes and services.
- ISO/IEC 17020: Conformity assessment - Requirements for the operation of various types of bodies performing inspection.
- Conformity assessment - General principles and requirements for validation and verification bodies.
- ISO 15489: Information and documentation - Records management.
- IAF MD 1: IAF Mandatory Document for the Audit and Certification of a Management System Operated by a Multi-Site Organization.
- IAF MD 2: IAF Mandatory Document for the Transfer of Accredited Certification of Management Systems.
- IAF MD 4: IAF Mandatory Document for the Use of Information and Communication Technology (ICT) for Auditing/Assessment Purposes
- IAF MD 5: Determination of Audit Time of Quality, Environmental, and Occupational Health & Safety Management Systems.
- IAF MD 9: Application of ISO/IEC 17021-1 in the Field of Medical Device Quality Management Systems (ISO 13485)
- IAF MD11: IAF Mandatory Document for the Application of ISO/IEC 17021-1 for Audits of Integrated Management Systems.

- IAF MD22: Application of ISO/IEC 17021-1 for the Certification of Occupational Health and Safety Management Systems (OH&SMS).
- IAF MD28: IAF Mandatory Document for the Upload and Maintenance of Data on IAF Database.

3.9. The solution must allow SABS to incorporate the functional capability:

Sales and Business Development Management:

- Online Product/Service Browsing:
    - Implement the ability to browse products or services online.
- In-App Conversations:
    - Enable chatbots and virtual assistants to handle routine inquiries.
    - Guide users through request submissions and provide instant responses.
- Sales Enquiries Management:
    - Automate routine tasks related to sales inquiries (integration with CRM required).
- Sales/Service Requisitions:
    - Automate routine tasks for managing sales and service requests.
- Application and Review Process:
    - Streamline the process of managing application
    - Track customer/internal feedback/comment and reviews
    - Interface with Companies and Intellectual Property Commission (CIPC) for company registration
- Document Uploads:
    - Allow users to upload documents in various formats.
- Quotations:
    - Ability to query subsidy and travel rates (integrate with travel and claim management system)
- Workflow Approval:
    - Implement workflow approval for quotations and application processes.
- Leads and Opportunity Management:
    - Automate routine tasks related to leads and opportunities (integration with CRM required).
- Case Management:
    - Employ case management with document management handling.
- Financial System Integration:
    - Integrate with the financial management system for accounts creation.
    - Create sales order
    - Check financial status
    - Create a job/work order link to sales order

- Tender
    - Register and track tender

Conduct Scope of Service (Certification, Local Content Verification and Consignment Inspection)

- Plan and schedule resources:
    - View resource availability (query leave management system)
    - Flag/indicate resource's plan/schedule conflicts
    - GeoZone plan/schedule based on location (GPS) in proximity (Radius – route within a set kilo meters) to other client sites
    - Match resource competence relevant to customer service scope
    - Ability to view client account status
        - Customer ability to pay for a proforma invoice
    - To access Laboratory Services Division test demand plan (integration with laboratory information mana
    - Ability to share site visit itinerary
    - Propagate plan/schedule to calendar for enterprise-wide visibility
- Site visit:
    - Customer able to view a technical CV of an assigned resources
    - Prepare a technical assessment at the customer site
    - Customer signoff opening/closing meeting attendance register
    - Able to route a technical assessment to lead for review
    - Record all facts (POE) as evidence for conduction of audit/inspection
    - Record samples and track location delivery status
    - Manage non-conformity both major and minor
    - Review onsite non-conformity quotation and associate to sales order (associate to work order)
    - Close job/work order trigger invoicing by finance
    - Assess the technical billable items for Customer invoicing and associate to sales order
    - Make it easy for SABS to be mobile (collaborate remotely and work together)
- Certificate Issuance:
    - Delegate authority signs-off certification (deployment of cryptography or similar techniques)
    - Secure published electronic certificate and enforce valid period
    - View authorised electronic certificates (disclosures) issued by the SABS

Customer Engagement

- View a job/work order
- View a sales order
- Manage customer requestions and queries.

- Manage customer complaints
- Customer satisfaction surveys

Resource Management (Internal & External)

- Plan and allocate resource' utilization
- Review resource competence
- Plan resource's skills training
- Interface with South African Auditor and Training Certification Authority (SATCA), South African Institute of Chartered Accountants (SAICA), or any regulatory bodies for resource validity
- Register and manage equipment and tools
- Maintain retention periods of technical requirements

Customer Profile Management

- Customer view and update profile
- Customer request service
- Access feedback during the certification process
- Log certification requests
- Receive feedback on certification requests

Finance

- Customer to track payments and outstanding bills
- SABS ability to send customer invoices online
- To be able to view customer's account status

Reporting

- View and generate reports
- Custom fields are reportable
- Ability to report on question level data from surveys and assessments/tests
- Ability to add filters to view reports on screen
- Customizable reporting

Deliverable: Working application/system that meets the requirements laid out in the system analysis phase, Business Requirements Specification, and Functional Requirements Specification documents.

3.10. Testing & Quality Assurance (QA)

The contracted service provider shall be responsible for executing rigorous and exhaustive testing of the proposed Certification Information Management System (CIMS). This encompasses comprehensive assessment across various devices, and operating systems to pinpoint and address any functional discrepancies, irregularities, or bugs encountered - paramount importance is placed on guaranteeing seamless cross-device and cross-platform compatibility by the contracted service provider. Additionally, the service provider must conduct load testing to verify the system's capability to effectively manage heightened concurrent traffic volumes.

During the development phase, the contracted service provider shall formulate a Testing and User Acceptance Testing (UAT) plan, which will be submitted for approval by the South African Bureau of Standards.

The Testing and User Acceptance Testing plan must encompass all testing scenarios and test cases. The plans shall include a Requirements Traceability Matrix (RTM) as an essential component. The Requirements Traceability Matrix shall serve to provide a clear and structured mapping between each test case/scenario and the corresponding functional and business requirements it validates. The Requirements Traceability Matrix shall facilitate traceability throughout the project lifecycle by establishing a link between the initial requirements (i.e., business requirements specification), the design and development phase (i.e., functional requirements specification), and the testing and validation phase. It shall serve as a reference document for stakeholders to ensure that all requirements are adequately tested and validated, thereby enhancing the overall quality and reliability of the final product.

The system must undergo comprehensive testing to the satisfaction of the South African Bureau of Standards (SABS) cross-functional implementation team before the final go live. The contracted service provider shall provide a minimum viable prototype in testing mode to utilize during the respective User Acceptance Testing phase.

User Acceptance Testing of the system will be conducted collaboratively with representatives from SABS. During User Acceptance Testing, all final functional requirements must be thoroughly tested. In the event of any discrepancy between the functional requirement specifications and the outcomes of the User Acceptance Testing, the contracted service provider must identify the revealed bugs and promptly address them. The identified bugs will then undergo subsequent testing to ensure compliance. This iterative process will continue until all requirements in the checklists are tested and validated as correct by the SABS and approved in compliance with the final functional requirements.

3.11. Testing

The service provider has the responsibility to ensure that the implemented off-the-shelf or custom developed solution undergoes thorough testing. which verify that different components of the system work together properly, Penetration Testing, and User Acceptance Testing, which allow end-users to test the software to ensure that it meets their standards.

Deliverable(s) (Not limited to): Quality Assurance Report, Signed User Acceptance Test (UAT) Report, Requirements Traceability Matrix.

3.12. Data Migration

As part of the scope of work for this project, the appointed service provider shall be responsible for executing a comprehensive data migration process. This process involves transferring data from all historical sources or repositories to the newly procured Certification Information Management System (CIMS).

Implications for the Appointed Service Provider:

(i) Assessment and Planning:

- Conduct a thorough assessment of the existing data structures and formats in the historical LIMS.
- Develop a detailed migration plan, including timelines, resource allocation, and risk management strategies.

(ii) Data Extraction:

- Extract all relevant data from the historical source applications, ensuring data integrity and accuracy.
- Address and resolve any data inconsistencies or anomalies identified during the extraction process.

(iii) Data Transformation:

- Transform the extracted data to meet the format and structure requirements of the destination applications.
- Ensure that data transformation maintains the semantic meaning and integrity of the original data.

(iv) Data Loading:

- Load the transformed data into the destination applications.
- Verify that all data has been accurately and completely transferred to the new LIMS.

(v) Data Validation and Quality Assurance:

- Perform rigorous data validation checks to confirm the accuracy and completeness of the migrated data.
- Conduct quality assurance tests to ensure the functionality and performance of the new LIMS with the migrated data.

(vi) Documentation and Reporting:

- Document all stages of the data migration process, including methodologies, challenges, and resolutions.
- Provide regular progress reports to the project management team, highlighting any issues and their impact on the overall project timeline.

(vii) Risk Management:

- Identify potential risks associated with the data migration process and develop mitigation strategies.

- Proactively manage and communicate any risks or issues that could impact the successful completion of the data migration.

As of August 2024, the Certification division's data is currently stored across multiple platforms or systems including:

System	Version	Estimate Size of Existing Data	Type of Data
QS Admin	A centralized platform to effectively manage and maintain crucial information pertaining to certified clients and the specific standards they have been certified against. The QS Admin system serves as a comprehensive database, storing and organizing essential data related to clients, their certification status, and the corresponding standards they adhere to. Moreover, the system also encompasses the storage of client fee information.		
	Oracle Forms Version 6, Oracle 11g	88 GB	Records
AB Minutes (SharePoint File Repository)	An automated system on SharePoint. This system enables the Approvals Board to centrally review submitted certification packs, eliminating the need for couriering the audit packs.		
	SharePoint 2010 & Nintex 2010, SQL 2019	757.54 GB	Record Files

Additionally, some of the department's data is still maintained through physical means, such as paper files and other non-digital formats. This varied data storage landscape is crucial to consider in the upcoming data migration to ensure that all data is accurately and securely transferred to the new system.

4. User Training & Knowledge Transfer

The contracted service provider shall provide training to the various teams within the various departments in the Certifications division. Moreover, the contracted service provider shall provide copies of the Certification Information Management System (CIMS) training manual along with appropriate training guides.

The contracted service provider should prepare supporting manuals for the developed Certification Information Management System in an easy to understand and user-friendly language with proper diagrams, screenshots and charts wherever required.

5. Deployment

The contracted service provider shall collaborate closely with SABS ICT & Knowledge Management team to ensure seamless integration and deployment of the proposed Certification Information Management System (CIMS) within the existing SABS infrastructure/environment, meticulously handling the transition to the live environment.

The contracted service provider shall provide infrastructure/server requirements for the deployment of the development (DEV), quality assurance (QA), and production (PROD) environments **PRIOR** to the commencement of any deployment activities for the proposed Certification Information Management System.

6. Hosting solution requirements and license requirements

The proposed system must have the capability to be hosted on the cloud (Azure).

User License: 100 (Perpetual licensing**)** internal concurrent users including admin users and allow unlimited number customers to access the outside SABS environment.

7. Support and Maintenance for Five (5) Years

After the official handover of the proposed Certification Information Management System, the contracted service provider shall provide support and maintenance for the new Certification Information Management System for a period of five years. Within this support, software updates and software releases should be provided to correct the errors and bugs of the system. A contact person should be allocated from service providers team for fielding technical support issues. The SABS's staff can report all the revealed error cases and bugs to the contracted service provider in written form (email) or by telephone.

Bidder to submit a draft Service Level Agreement. (**NB:** The SLA is to be finalized during the contracting stage)

Other tasks to be fulfilled during support and maintenance period by the contracted service provider include:

(i) Resolution of errors/bugs reported by the client.

(ii) Support user access issues.

(iii) Emergency tech support.

(iv) Updating the software and plugins.

(v) Monitoring of software (i.e., uptime, malware scanning, DNS poisoning, etc.)

(vi) Backups & support (weekly backups) and restoration when needed.

(vii) Running security scans.

8. Intellectual Property Rights & Ownership

Upon successful completion and implementation of the project, the service provider shall facilitate the seamless transfer of ownership for all project artifacts and documentation to the SABS. This transfer of ownership is an essential step to ensure the client's autonomy and control over the delivered solution.

(i) Project Artifacts:

The service provider is bound to facilitate the transfer of ownership of all project artifacts, including but not limited to:

- Source code

  NB: Source codes should present in a way that the programmer/analyst possessing the relevant knowledge shall be able to use it and the software codes to recreate the system from scratch. The source code shall be with detailed comments on the code.
- System design documents
- Technical specifications
- User manuals
- Test scripts and reports
- Any other relevant project deliverables

The transfer of ownership shall be initiated within a pre-determined period of time after the project's acceptance and sign-off, unless mutually agreed otherwise in writing.

(ii) Documentation:

The service provider shall provide the client with copies of all project-related documentation in both electronic and, if requested, physical formats.

Documentation to be transferred includes, but is not limited to:

(i) Project plan

(ii) Requirement specifications

(iii) Change management documentation.

Support and maintenance guides

(iv) Project Charter document

(v) Project Schedule using MS Project

(vi) Project Management Plan document

(vii) RAID Log

(viii) Reviewed and Signed System Requirements Document

(ix) System Design Document (Technical Functional Document)

(x) Signed User Acceptance Test (UAT) Report

(xi) Training plan and Training Manuals

(iii) Format and Accessibility:

The service provider shall transfer the ownership in a format agreed upon by both parties. Common formats include, but are not limited to, digital files (e.g., PDF, Word, Excel) or through a mutually agreed-upon version control system.

The SABS shall have unrestricted access to the transferred artifacts and documentation without any limitations on usage, modification, or distribution.

9. Timelines

The proposed project duration is **24 months** from the appointment date excluding the support and maintenance period. A detailed project plan will be agreed upon and signed off during the contracting phase.

10. Project Management Approach

When implementing the end-to-end automated CIMS, the contracted service provider will be required to follow a recognize project management methodology accompanied by the experienced project manager assigned to the project having implemented similar projects with a professionally registered PMP / Prince2 practitioner /Scrum master).

11. Maintenance Service Overview

Managing the quality of a service requires the establishment of performance standards, or service levels, against which service delivery can be measured. The Service Level Agreement to be entered into between the SABS and bidder forms the basis of the contract extension negotiations. The bidder as the main contractor

and SABS as the Customer and is based on:

- Support level selected for specific services;
- Infrastructure design and configuration;
- Currency of technology deployed;
- Specific requirements that may be agreed; and
- Business objectives of the Customer.

12. Services Provided Under this Agreement

The Services Provided under the SLA are Call Centre Support, Technical Services Support including Integration.

i. Services

There shall be a monthly SLA performance and other enhancement progress reporting at the customer's offices

ii. Inclusions

The following services shall be performed as part of the support and maintenance contract at no additional cost:

- System Patching and Upgrades (including the imbedded integration, Enterprise Services Bus (ESB) components major release upgrades)
- Monthly application performance monitoring and reporting
- On-site support and transfer of skills.
- Remote Support assistance using Remote Desktop and a Virtual Private Network as and when the client see fit.
- Daily, Weekly, Monthly, Quarterly and yearly system health checks.
- Monthly incident reporting
- Managed telephone support during Business.
- Monitored email support during Business Hours (Service Desk)
- Logging of all System related queries and requests
- Service Desk Support will be limited to questions, quick references, logging of fault reports and requests for services only.
- All Legislative changes required.
- Monthly transactional reporting.
- Daily end user application support.
- Super user and end user training.

  System configuration services.
  Security Compliance.
- Planned or Emergency Onsite assistance are part of maintenance

  As- And-When required professional service
  Professional service rate card will be used for new integration requirements
- The Integration database will be checked daily for capacity issues and any fine tuning required and/or optimizations needed.
- Provision for Security Patches and releases and minor upgrades will be done monthly and provision for with no limitation on as and when upgrades and patches are required.
- Transactional reports will be done monthly as well as capacity reports and any SLA statistics required along with inputs into the monthly SLA reporting process.
- Skills transfer and on job training to be provided to the SABS resources.
- Service Desk Support.

  Response Time: Time taken by the Service Provider to attend to the call or contact the Customer for more information.
- **Resolution Time:** Time taken by Service Provider to resolve the call, i.e. system function restored, program fix supplied or practical workaround identified.

Severity	Response Time	Resolution Time
Severity 1	30 Minutes	4 hours
Severity 2	2 hours	8 hours

Severity 3	8 Hours	2 Working Days
Severity 4	24 hours	4 working days
Severity 5	36 hours	7 working days

NB:/Extended time for resolution of issues will initiate penalties by the client based on rate card as per the support personnel for that module.

iii. Incident Severity Definitions

Severity Level	General description
Severity-1 (High Priority)	Service not available– Customer Business System failure impacting
Severity-2 (Medium to High Priority)	Critical Business Impact - Business Systems Failure - Business Functional Services Unavailable or Mal Functioning
Severity-3 (Medium Priority)	Customer Business system failure impacting only certain business functions, areas or locations
Severity-4 (Low priority) Minor Business	Impact - individual Incidents, where a mal functioning of a service
Severity-5 Change requests	Change request and reporting request

iv. Service Provider Responsibilities under the Maintenance and Support Contract

- Service Provider responsibilities and/or requirements in support of this Agreement include:
- Meeting response times associated with service-related incidents.
- Appropriate notification to Customer for all scheduled maintenance.

Maintain User and Training Manuals

- Create a Training Competency Plan with imbedded KPI's and Performance Matrix, to be agreed by SABS team upfront
- Train SABS ICT Staff and End Users based on the Training Plan as and when required

Roles and Responsibilities

- Service Provider must provide qualified resources to support the SABS delivery of the project and maintenance support and shall provide the following resources but not limited to this list. Substitution will be done either on request by the client due to non-performance or any other non-delivery. The SABS reserves the right to request replacement of any resource.

Systems Engineer /DBA	The role involves setting up, administering, maintaining and upgrading databases for an organization. DBA are also responsible for security, data storage and disaster recovery strategies.

Technical Support	Solving the problems of business, supporting, monitoring and maintaining workplace technology and responding to users' requests for service. May require professionals with specific experience and knowledge. (Service Provider)
Functional Support	Provide functional support to guide the specific use of specific applications. Configures systems according to business needs and helps develop processes to manage the day-to-day functioning of a program or system.
Developer	The role of a developer includes developing new modules/function or enhancing the existing modules based on approved user requirements

Appendix B

Intention to respond to the Request for Proposal

We hereby accept / decline your Request for Proposal.

Company:____

Company Representative:____

Position/Title: ____

Signature:____

Please state a brief reason for declining this Request for Proposal________________________________

Appendix C

SBD 4 **BIDDER'S DISCLOSURE**

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise,

employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

1 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, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

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.

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 2022/22 ON PREVENTING AND COMBATING ABUSE IN THE

SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

……………………………… ………………………………………………

Signature Date

……………………………… ………………………………………………

Position Name of bidder

Appendix D

NON-DISCLOSURE AGREEMENT

THIS AGREEMENT is made BETWEEN
The South African Bureau of Standards (SABS), an organisation established in terms of section 2 of the Standards Act (29 of 1993), whose registered office is at 1 Dr Lategan Road, Groenkloof, Pretoria, 0001, South Africa.

AND ____(“the Bidder”),
Registration Number: ___________________________ whose registered office is at
____
____
(Hereinafter referred to as the “parties”)

WHEREAS in the course of discussions and/or negotiations with the South African Bureau of Standards, the Bidder has received, or may receive in future, information relating to **RFP 201566,** for the South African Bureau of Standards and other related information hereinafter referred to as “Confidential Information”. “Confidential information” shall include, but not be limited to any information disclosed by the SABS and / or any of its their affiliates, employees, agents, representatives, subcontractors and consultants to the Bidder, its employees, agents, representatives and consultants, whether orally, in writing, by graphic, pictorial or electronic format, which information includes but is not restricted to Business information, including know how, commercial and technical aspects of products, processes and services; status and capabilities of the SABS’ business; The SABS or its subcontractors’ marketing and planning programs, products specifications, Service specifications, plans, drawings, test results and findings; financial, operational and technical data; and particular types of technologies and inventions, that already currently exist or that the SABS wishes to be developed, which could be subject to intellectual property rights, whether registered and/or unregistered.

Therefore, the parties wish to agree as follows:

1. The Bidder undertakes to keep strictly secret and confidential all confidential information relayed or transmitted to it in any manner or form and will not divulge any part of the Confidential Information directly or indirectly to any person, firm or entity (other than such of its employees who have a need to know the Confidential Information for the purposes of fulfilling the Bidder’s obligation to the South African Bureau of Standards).

2. The Bidder undertakes to not make copies of the Confidential Information or otherwise disseminate any of the Confidential Information (except as may be required to fulfil specific obligations towards South African Bureau of Standards) without South African Bureau of Standards express prior written consent.

3. This agreement applies to information whether such information is marked as or appears to be confidential and whether such information is of commercial use to South African Bureau of Standards or any other party.

4. This agreement shall not apply to information which: -

(a) the Bidder can show had been lawfully received by it prior to disclosure under this agreement.

(b) is in the public domain or becomes so otherwise than through breach of this agreement;

(c) was disclosed to the Bidder by a third party who was under no obligation of confidence in respect thereof;

5. The Bidder further undertakes that the South African Bureau of Standards retains ownership of all Intellectual property rights on all material and processes developed that relate to the service provided for and on its behalf by the Bidder. The Bidder undertakes to transfer all said Intellectual Property Rights, whether registered and / or unregistered, to the SABS, including undertaking to sign all forms necessary to affect such transfer.

6. The Bidder acknowledges that the confidentiality obligations extend from signature of this agreement and survive the termination of the tender process, whether the Bidder is successful or not.

IN WITNESS WHEREOF the parties hereto have executed this agreement in duplicate.

Signed at…………………. ……………on this………day of ……………………………………….2024

On behalf of the South African Bureau of Standards .... …………. (signature) Hleketa Hlongwane (SCM)

Witness 1. …………………………………….. Witness 2. ……………………………………..

Signed at………………………………… on this………. day of ………………………………………...2024

Signed on behalf of the Bidder, duly authorised thereto... (signature)

.... (name) .... (title)

Witness 1. …………………………………….. Witness 2. ……………………………………

To: Tenders.prince@sabs.co.za

Appendix F

Attached SABS contract or NEC or FIDIC will be entered into with the awarded service provider.

Annexure G
CSD REPORT

Appendix H – BBBEE Certificate/Sworn Affidavit

Appendix I - Quotation

Item No.		Activity description	Price

Total sum Carried over to Bid Offer			

Appendix J
Management Summary

Appendix K

Statement of Compliance to the Request for Proposal

Company Name: ____

Proposed Service: ____

It is hereby confirmed that the proposal response to the SABS' RFP is fully compliant with all points with the exception of the specific issues outlined below:

____
____
____
____
____
____
____
____

Signed: ____ (Authorised Signatory)

Name: ____

Position: ____

Date:____

Appendix L
Page 2 of tender document

 Publication date: 15 November 2024

Appendix M

AUDITED FINANCIAL STATEMENT

Appendix N

Request for Proposal Enquiry

To: Prince.Hlongwane@sabs.co.za **From:** ____

Questions:

Answers:

To: prince.hlongwane@sabs.co.za

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

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1. GENERAL CONDITIONS

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

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

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

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

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**

$$\boldsymbol{Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)} \quad \text{or} \quad \boldsymbol{Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)}$$

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**

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

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.*)**

Specific Goal	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)
Persons historically disadvantaged on the basis of race	100% black ownership	10	
	75% - 99% black ownership	8	
	60% - 74% black ownership	6	
	51% - 59% black ownership	4	
	0% - 25% black ownership	2	
	0% black ownership	0	
Persons historically disadvantaged on the basis of gender	100% black women ownership	6	
	51% - 99% black women ownership	4	
	30% - 50% black women ownership	2	
	0% black women ownership	0	
Persons historically disadvantaged on the basis of disability	100% owned by persons living with disabilities	4	
	51% - 99% owned by persons living with disabilities	2	
	0% - 50% owned by persons living with disabilities	0	

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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INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	RFP 201566	CLOSING DATE:	10 December 2024	CLOSING TIME:	11:00am
DESCRIPTION	**Implementation of an end-to-end automated Certification Information Management System (CIMS)**				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)*					

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON		CONTACT PERSON	
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS		E-MAIL ADDRESS	

SUPPLIER INFORMATION						
NAME OF BIDDER						
POSTAL ADDRESS						
STREET ADDRESS						
TELEPHONE NUMBER	CODE		NUMBER			
CELLPHONE NUMBER						
FACSIMILE NUMBER	CODE		NUMBER			
E-MAIL ADDRESS						
VAT REGISTRATION NUMBER						
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		**OR**	CENTRAL SUPPLIER DATABASE No:	MAAA	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ No	

Publication date: 15 November 2024

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]			
1.1.1.1 ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	**1.1.1.2** ARE YOU A FOREIGN BASED SUPPLIER FOR **THE GOODS /SERVICES /WORKS OFFERED?**	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO

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

SBD1

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– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

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 / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (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."

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

SIGNATURE OF BIDDER: …………………………………………

CAPACITY UNDER WHICH THIS BID IS SIGNED: …………………………………………

(Proof of authority must be submitted e.g. company resolution)

DATE: