

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NATIONAL TREASURY)

BID NUMBER:	NT002-2025	CLOSING DATE:	07/03/2025	CLOSING TIME:	11:00 AM
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DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD
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BID RESPONSE DOCUMENTS MAY BE SUBMITTED ONLINE

National Treasury

ETender Portal

Bid Proposals to be submitted online on the ETender Portal

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Supply Chain Management	CONTACT PERSON	Supply Chain Management
TELEPHONE NUMBER		TELEPHONE NUMBER	
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	NTAdministrativeTenders@Treasury.gov.za	E-MAIL ADDRESS	NTAdministrativeTenders@Treasury.gov.za

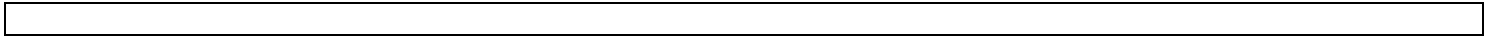
SUPPLIER INFORMATION

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

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> 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.	



**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, 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:



INFORMATION AND COMMUNICATION TECHNOLOGY

TERMS OF REFERENCE (TOR)

NT002-2025

APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD

CLOSING DATE: 07 MARCH 2025 AT 11:00 AM

VALIDITY PERIOD: 90 DAYS



TABLE OF CONTENTS

1. INTRODUCTION 4

2. PURPOSE 4

3. SCOPE OF WORK 4

3.1 Project Deliverables 4

3.2 Solution Requirements 5

3.2.1 Business Requirements 5

3.2.2 Licensing Requirements 6

3.2.3 Implementation Requirements 8

3.3 Project Resource Requirements 9

3.4 Bidder Requirements and Specification 12

4. SUBMISSION REQUIREMENTS 12

4.1 Resources Requirements 12

4.2 Bid Submission 13

4.3 Security Requirements 14

5. SUMMARY OF EVALUATION CRITERIA 14

5.1 Bid Evaluation Stages 14

5.2 Stage 1: Mandatory Requirements Evaluation 14

5.2.1 Additional Requirements (Not for elimination) 15

5.3 Stage 2: Functionality Evaluation 15

5.4 Stage 3: Preference Point System 22

5.4.1 Pricing Evaluation 22

5.4.2 Specific Goals 22

5.4.3 Timeframe (Project Duration) 24

5.4.4 Implemented Landscape 25

6. TERMS AND CONDITIONS OF THE BID 25



7.	ANNEXURE A1: CURRICULUM VITAE TEMPLATES.....	27
8.	ANNEXURE A2: DETAILS OF SERVICE PROVIDER	32
8.1	SERVICE PROVIDER.....	32
9.	ANNEXURE A3: SERVICE PROVIDER PROFILE	34
9.1	SERVICE PROVIDER.....	34
10.	ANNEXURE A4: LIST OF SIMILAR PROJECTS AND CLIENTS CONTACT TEMPLATE.....	36
11.	CONTACT DETAILS.....	37

TABLE OF TABLES

Table 1: Licenses and Modules Descriptions.....	6
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1. INTRODUCTION

This Terms of Reference (TOR) provides the specifications for the provision of appointing a service provider for the renewal and management of Ivanti 2023 software licences, services, and support and maintenance for the National Treasury (NT) Information and Communication Technology (ICT) for a three (3) year period.

The appointed service provider will manage the renewals of the existing licenses, new licenses as the environment grows, as well as providing all types of support as and when required.

NT is making use of Ivanti system as a solution for incident management. An upgrade and configuration of the firmware from the current Ivanti Service Manager (ISM) 2021.1 version to the latest ISM 2023.1 was concluded in April 2024. The purpose of the upgrade is to ensure continued support and maintenances is received from Ivanti as the older versions are being phased out.

2. PURPOSE

The purpose of this document is to provide Terms of Reference to service providers willing to bid for the appointment of a service provider for the renewal and management of Ivanti 2023 software licences, services and support and maintenance of the software for NT ICT for a three (3) year period. The provision will be for both new and the renewal of existing licenses as the environment grows, as well as to provide support on the software for a three (3) year period based on the three hundred (300) hours per annum.

3. SCOPE OF WORK

The scope of this Request for Proposal is to invite certified service providers to submit their proposals and pricing based on the requirement to be listed below.

3.1 Project Deliverables

Expected outputs/outcomes/benefits from the new IVANTI includes: -

- Renewed Licenses
- License Management Documentation
- Transition or handover plan
- A Service Level Agreement (SLA) defining scope, response times, escalation procedures, and coverage hours
- Configurable Escalation Engine to better manage Service Level Agreements which will result in greater customer satisfaction.

- Documentation or resources for troubleshooting common issues.
- Out of the Box Key Performance Metrics.
- Regular or on-demand incident reports detailing resolved issues, root cause analyses, and improvement suggestions and performance monitoring reports to report on system performance, identify potential risks or bottlenecks.
- Web based to support zero client deployment.
- SQL Server Reporting Services for automated reporting.
- Advanced Workflow Designer and Engine to streamline current manual processes.
- Enhanced Configuration Management for Change Impact Analysis.
- Embedded Knowledge Management to reduce number of Incidents raised with the Service Desk; and,
- Administration Enhancements that will greatly reduce the time to make system changes.
- Maintenance Schedule outlining regular maintenance activities such as updates and system checks.
- System updates and upgrades to ensure the system remains secure and operational.
- Project Management deliverables
- Business Analysis deliverables
- Developed and implemented new deployments
- Support and maintenance services
- Remote support and maintenance

3.2 Solution Requirements

3.2.1 Business Requirements

The Service Provider will have to perform the following activities to deliver the required support and implementation:

- To provide specialised software support on the Ivanti product solution to ensure optimal configuration and deployment of the software within the operational environment with a minimum of 300 hours per annum.
- The supplier and the Senior System Engineer / Application Developer must have the accredited skills to provide software support on the Ivanti product.
- Analyse the licensing status and conduct software license renewal.
- Thoroughly document requirements of new deployments and installations



- Optimally configure the new deployments
- Recommend improvements to the existing configuration.
- Provide optimal designs and recommendations for new deployments
- Ensure software is implemented against pre-defined processes, service levels and metrics.
- Provide support and maintenance on the Ivanti ISM and Voice integration as and when required.
- Assist in responding to audit and risk findings with proposals to mitigate said findings.
- Provide monthly reports on the status of the Ivanti environment.
- Provide input to and review standards and procedures associated to this software within the environment.
- Formally document and operationalise solutions and train support staff and users; and
- Support to be given 24/7 365 days.

3.2.2 Licensing Requirements

NT has the following Ivanti 2023 licences for different business units which must be renewed and maintained:

Table 1: Licenses and Modules Descriptions

License Description	Quantity
Ivanti Voice & Routing Ports	20
Ivanti Voice Automation (Agent) licenses	86
Ivanti Voice Automation (Supervisor) licenses	11
Ivanti Helpdesk Concurrent licenses	29
Ivanti Helpdesk Fixed licenses	79
Ivanti Service desk Concurrent licenses	21
Ivanti Service desk Fixed licenses	21
Service Management Concurrent licenses	2

The following are descriptions of what each Ivanti Module comprises:

- **Incident Management** – Capture, identify and respond to issues and service requests across the organization. Enable your help desk teams to automate incident processes and communications to quickly understand and restore service operations. The incident module can be configured to capture and process incidents on a singular basis, or leverage templates to process incidents quicker and with the aid of standards-based workflows. Out-of-the-box dashboards and reports help managers understand the incident management process, and when new analysis needs to be created, powerful configuration tools enable help desk teams to create, edit and maintain their own key performance indicators.
- **Problem Management** – Initiate actions to correct or minimize adverse impact from problems and address the root cause by focusing on known issues. Understand the problems source and allow the service desk to correct issues quickly through relationships, processes, and visibility. Problems can be linked to Incidents, and to Change requests allowing for more effective management.
- **Knowledge Management** – Improve service agent efficiency when real-time content is captured and exposed in an easy to access knowledge base. Help desk analysts can quickly search, view, and retrieve important answers to commonly asked questions they receive from their customers. Knowledge information is easily created, approved, and maintained in a central location so knowledge and best practices can be adopted throughout the organization.
- **Mobile Field Service** - Ivanti Mobile enables any corporation to extend the reach of service desk staff members to the mobile environment. The application allows users to interact with the core service management solution via Windows, Android, and iPhone mobile devices.
- **Survey** – Configure and initiate surveys so the help desk team can understand the impact of their business. Surveys can be configured to meet business demands. Clients can learn more about service management efforts by either awarding agents, or offering additional training. Leverage surveys for a true understanding of which help desk operations need improvement or further training, and which operations are performing well.
- **Self Service & Service Catalog** – Ivanti Service Management enables customers to view service management related information, submit new incidents, search the knowledgebase, and request services using an intuitive and friendly user interface. The self-service module reduces the

amount of calls the help desk teams take since customers can access the module to submit new incidents & requests, and review the progress of their existing items, thus helping lower help desk operational costs.

- **Change Management** –Workflow based change management includes the ability to plan, approve and implement changes to increase visibility and understand how each change will affect the organization.
- **Configuration Management (CMDB)** – Enable management of configuration items that make up the business services and IT infrastructure supported by the help desk. Define, identify, and report on configuration items across the IT landscape. Perform configuration management analysis so proper monitoring and cost savings can be achieved.
- **Release Management** – Plan, deploy and manage releases based on a comprehensive release strategy. Address the entire release cycle, from creation and planning through to communication and rollout by using either manual / individual changes, or more efficient, automated changes with the release management feature.
- **Service Level Management** – This feature provides a centralized management console to design, build and monitor service agreements throughout their lifecycle. Manage related activities and communications so teams can act should service fall short of established targets. Establish realistic expectations and manage costs through SLM analysis.
- **Voice Integration** - This solution is essential for managing incoming and outgoing calls, improving customer service, and enhancing overall operational efficiency

3.2.3 Implementation Requirements

The case of implementing new services, functionality and/or version upgrades the appointed service provider will need to conduct Business Analysis workshops with the different Business Units within the NT, to discuss and document the requirements of said Business Units. The appointed service provider will then produce a required documentations containing a detailed Gap Analysis between the current Ivanti 2023 functionality and the new requirements. Once the documents are approved by all parties, the team from the appointed service provider must perform the necessary system configurations to meet the requirements as detailed in the Solution Architecture Document/Functional Requirement Specification.



The appointed service provider team must install and configure the necessary import connections and email settings and migrate data to the upgraded platform. When they have completed all configurations, they will compile test cases and provide User Acceptance Testing (UAT) and Training. During the UAT period, they must document and fix any issues that may manifest. When the UAT process is completed, they must provide End User Training to all users before moving to production. The appointed service provider team must be onsite at the National Treasury for at least, the first two days of production to assist with any teething issues. Thereafter the project must be signed off and the National Treasury must contact the appointed service provider Support Services for post-production issues.

3.3 Project Resource Requirements

- The service providers are required to submit proposals that demonstrate their technical capability to carry out the task at hand.
- This includes presenting a project implementation methodology that aligns with modern agile development practices, as well as maintenance and support services that ensure 100% uptime and availability of the solution and its associated components.
- It is imperative that the service provider furnish a dedicated project manager who will oversee the activities of the development, maintenance, and support team, a business analyst that will analyse, document and test system requirements for new deployments and a developer/ivanti engineer for software development and software maintenance and support.
- The resources required for the scope of work include the following roles:

a) Project Manager

Table 2: Resource Requirements

Core Description
Job Title: Project Manager
A Project Manager with adequate experience in the ICT field and business solutions. The Project Manager must ensure that a project is completed on time and within scope and budget, that the project's objectives are met and that the project team is properly as per their roles. The Project Manager must oversee the project to ensure the desired results are tracked and delivered, must provide regular reporting on the progress of the project and ensure that the most efficient resources are used, and the different interests involved are satisfied.
Qualifications:



- Desirable or equivalent minimum of 5 years of experience, with at least five years of managing complex projects in a technical environment.
 - Desirable or equivalent Certified Project Management Certifications
 - Desirable or equivalent experience in Microsoft Project (MSP)
 - Minimum of National Diploma NQF6 in ICT and related fields (IT, Computer Science, and Engineering discipline)
- Experience/ skills required:**
- Experience in Information Technology management projects.
 - Extensive Project Management Skills (Minimum 5 years) Project/Program Planning skills; Financial Management Skills; Scope Management skills; Time management skills, Quality Management skills; Risk and Issue management skills; Project Budgeting skills; Integration Management skills; Human Resource Management skills; Communication skills; Report writing skills.
 - MS Office Computer Literacy.
 - Experience with full product lifecycle with understanding of development lifecycle and various technology methodologies that support that lifecycle
 - Ability to multi-task.
 - Assist with any other tasks to be assigned by the management team

b) Business /System Analyst

Core Description
Job Title: Business / System Analyst
The Business / System Analyst with adequate experience in the ICT field, business analysis and/or systems analysis, systems testing and training, documentation of requirements, test cases and user manuals. The Business / System Analyst is responsible for analysing business requirements, processes, systems, and structures, and recommend improvements. The Business / System Analyst is also involved in the implementation and quality assurance improvements.
Qualifications:
<ul style="list-style-type: none"> • Minimum of National Diploma/NQF6 in Information Technology/Computer Science • Business and System Analysis qualification/certifications would be essential.
Experience/ skills required:



- 5 years' experience in Business System Analysis, business process management and business process engineering
- Experience with SDLC, Agile and other system development methodologies
- Experience in ICT solutions delivery, business logic modelling, design and implementation
- Experience working with multiple applications/ systems preferred.
- Oral and written communication skills
- Software testing experience
- Knowledge of QA testing methodologies and the test lifecycle

c) ICT Service Support (IVANTI Senior Consultant)

Core Description
Job Title: Ivanti Senior System Engineer / Application Developer
<p>The Senior System Engineer / Application Developer is responsible for implementing, configuring, maintaining, and optimising the Ivanti Service Manager (ISM) platform to support the organisation’s Ivanti software and business process automation needs. The Senior System Engineer / Application Developer must have adequate technical expertise in the Ivanti platform with problem solving and collaboration skills to ensure the system delivers maximum value.</p> <p>Qualifications:</p> <ul style="list-style-type: none"> • Desirable/Equivalent Qualifications: • Ivanti Classic, ITSM, and Ivanti 20.x Certification • ITIL V2 and V3 Foundation Certification • Minimum of National Diploma/ NQF6 in Information Technology/Computer Science or any related field. Must be in possession of Software Development certification(s). <p>Experience:</p> <ul style="list-style-type: none"> • Minimum of 5 years of experience in Ivanti Service Manager, ITSM, Ivanti Voice, Ivanti Discovery, DSM, and Ivanti 20.x. • Experience with Migrating Ivanti Classic and ITSM Platforms to Ivanti 20.x • Dedicated Service Desk for Office Hours Support • Registered Ivanti Software Value Added Supplier (registered to sell and support Ivanti Software products)

- Software testing experience.
- Able to test in a fast-paced environment with both long and short development cycles.
- Knowledge of QA testing methodologies and the test lifecycle
- Knowledge and experience with a variety of different test strategies and approaches (Exploratory, Ad-hoc, Boundary, Functional, Non-functional, etc.).
- Ability to clearly communicate software issues and behavior to development, product management, and operations; and
- Desire to learn, share knowledge, and take initiative.
- Experience working with defect management

3.4 Bidder Requirements and Specification

- The Bidder represents that,
 - it has the necessary expertise, skill, qualifications, and ability to undertake the work required in terms of the scope of work or system requirements.
 - it is committed to providing the Products or Services; and
 - perform all obligations detailed herein without any interruption to the Customer.
- The Bidder must deliver the service professionally, following best practices and high standards typical of well-managed businesses providing similar services.
- The Bidder must perform the Services in the most cost-effective manner consistent with the level of quality and performance as defined in the scope of work or System requirements.
- Sufficient capacity to provide support and maintenance of software solution (Support structure/organogram)
- A brief narrative profile of the potential bidder must be submitted in the prescribed format in (Annexure A2) as part of the bid documentation and attached supporting documentation.

4. SUBMISSION REQUIREMENTS

4.1 Resources Requirements

- The bidder must provide the skills set required by the NT.
- Only CV's may be submitted if the employee is employed or affiliation with the company submitting the CV. Proof of employment or affiliation with the company could be requested.
- The bidder must include project experience proof to support the Job Profiles for the skills sets required; and



- The contact details of the relevant management of the bidder must be provided as part of the bid documentation.
- Submitted CVs for individual consultants must indicate that they have specific experience in the provision of the required competencies and service provider(s) are required to submit the contact details of at least three (3) recent references who will confirm that the individual consultants have carried out similar work to that stated in their CVs.
- Service provider(s) should ensure that the CVs they submit are for individuals who would be willing to carry out ICT assignments. CVs of an organisation's senior managerial staff, albeit highly qualified individuals, should not be submitted unless these individuals are prepared to give full commitment to actively carrying out ICT assignments.
- ICT reserves the right to contact references as per the prescribed reference template (Annexure 2) during the evaluation and adjudication process to obtain information.

4.2 Bid Submission

- Service providers must respond to the TOR and follow the prescribed formats provided ICT requires specific professional services for the software development related projects as indicated in the TOR and these must be addressed by the service provider.
- Key personnel must be carefully chosen by the service provider and well-motivated through the curricula vitae (CVs). The format of the CVs must be strictly in accordance with the format indicated in **(ANNEXURE A1)** below. Non-compliance with the format provided and a lack of signed declaration by the described individual will result in disqualification of the CV. CV's must be signed by the proposed resource.
 - The service provider must include project experience proof to support the job profiles for the skill sets required.
 - The contact details of the relevant management of the service provider must be provided as part of the bid documentation.
- A detailed price proposal should be provided indicating the cost of each of the deliverable including the co-ordination thereof. The bidder should provide quotations for the following:
 - Licenses required.
 - Maintenance service according to the SLA to be agreed upon; and
 - Support rate.
- Provide a letter and contact details of at least 3 existing clients where a similar service has been successfully completed and arrange a site visit to one of the clients, should a visit be required by the NT.



- The bidder must undertake to conclude a Master Service Agreement (MSA) and Service Level Agreement (SLA) in agreement with the NT. The MSA and SLA must consist of, but is not limited to the following:
 - Clear description of the required services and deliverables
 - Defined payment terms for the service.
 - Agreement on the timeline.
 - Agreement that the successful bidder shall be the single point of contact for the service.
 - Agreement that the successful bidder must provide qualified personnel who have undergone necessary training and certification to provide the required service. Should the skill/s not be available in-house, this must be specified.

4.3 Security Requirements

All resources will be required to sign an Oath of Secrecy and submit security vetting information as per the NT security policy.

5. SUMMARY OF EVALUATION CRITERIA

5.1 Bid Evaluation Stages

The bid evaluation process consists of three stages, a bidder must qualify for each stage to be eligible to proceed to the next stage of the evaluation. The stages are as follows:

Table 3: Bid Evaluation Stages

Stage	Description
Stage 1	Administrative Requirements Evaluation
Stage 2	Functionality/Technical Evaluation
Stage 3	Preference Points System (Price and Specific Goals) Evaluation

5.2 Stage 1: Mandatory Requirements Evaluation

An administrative evaluation will be carried out on all the bids received and if the under mentioned documentation is not signed and/or attached such a bid will be eliminated from any further evaluation.

- a) Proof of company registration on Central Supplier Database Registration (CSD).



- b) CVs of the proposed/nominated resource(s) must be submitted in the prescribed format. CV's (**template provided**) must be signed by the proposed resource and not signed on behalf of the proposed resource. Unsigned or incomplete CVS and CVs submitted in a different template will not be considered. It should be noted that no consideration will be made to any bidder, that has provided profiles for their resources, which are also provided by another competitor in this same bid, this is considered collusive tendering. **Annexure A1 to A4 must be completed in full and signed.**
- c) Bidders must provide a letter/certification that indicates that they are a certified partner Ivanti Software Value Added Supplier.
- d) Bidder must provide proof/letter of being in good standing with the Original Software Manufacturer (OSM).
- e) In the case of a Joint Venture, Consortium, Trust, or Partnership a Valid Tax Clearance Certificate and/or SARS issued pin code for both companies must be submitted (which will be verified)
- f) In the case of a Joint Venture, Consortium, Trust, or Partnership, a signed teaming agreement must be submitted.
- g) In the case of a Joint Venture, Consortium, Trust, or Partnership a Consolidated Central Supplier Database Registration (CSD) or both companies CSD are required.

FAILURE TO ADHERE TO THE CONDITIONS OF THE BID WILL LEAD TO DISQUALIFICATION.

5.2.1 Additional Requirements (Not for elimination)

- Proof of valid registration with Compensation for Occupational Injuries and Disaster (COIDA).
- Valid work permit and existing security clearance for foreign nationals are compulsory. If not provided, the lowest score will be allocated.
- Bidders are required to submit proof of educational qualification(s) for all resources required.
- All copies of qualification(s) must be certified, and the certification must be valid for six (6) months from the required bid submission date. If not, the lowest score will be allocated.
- All foreign qualifications must be accompanied by South African Qualifications Authority (SAQA) certificate of evaluation. If not, the lowest score will be allocated.

5.3 Stage 2: Functionality Evaluation

- **Note: Refer to the section 2 for the Special Requirements and Conditions of Contract document for guidelines on the evaluation criteria and process.**

Table 4: Functionality Evaluation Criteria

Evaluation Criteria	Weight	Scoring Criteria
1. Company Experience	20	5- Excellent



<p>The bidder must have previously successfully supplied or installed or configured or maintained and supported similar projects in the past 5 years.</p> <p>The list and evidence must address the following:</p> <p>Description of the project, Client name, Client contact (i.e., email and office number), Project start date, project end date, and contract value. Furthermore, attach a completion certificate signed by the client or a letter from the client confirming the successful completion of the project. completion certificate or reference letters should be on referral client letterhead and signed.</p> <p>NB: Letter that does not reflect all required items will be allocated the lowest score.</p>		<p>5 or more reference letters submitted reflecting all items and discussed in detail.</p> <p>4- Very Good 4 reference letters submitted reflecting all items.</p> <p>3 -Good 3 reference letters submitted reflecting all the items.</p> <p>2- Average 2 reference letters submitted reflecting all items.</p> <p>1-Poor 0-1 reference letters submitted reflecting all items</p>
<p>2. Resource Experience (companies should indicate their level of skills to the product incl. an indication of their years of relevant experience relating thereto).</p> <p>NB: If one of the two required qualifications (National Diploma/NQF6 or certifications) is submitted, the bidder will be allocated the lowest score</p> <p>NB: <u>Total Bidder Resource Score</u> = Total Project Manager Score + Total ICT Service Support (Senior IVANTI Consultant) Score + Total Business/System Analyst Score</p>		
<p>2.1. Project Manager Qualification</p> <p>A minimum of a National Diploma/NQF6 in ICT and related fields (IT, Computer Science, and Engineering discipline).</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Project Management certification</p>



<p>Plus, equivalent Certified Project Management Certifications</p>		<p>4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Project Management certification</p> <p>3 = National Diploma/NQF6 plus Project Management certification</p> <p>2= Matric plus Project Management certification</p> <p>1= Matric without project management certification</p>
<p>2.2. Project Manager Experience</p> <p>Desirable or equivalent minimum of 5 years of experience, with at least five years of managing complex projects in a technical environment. Desirable or equivalent experience in Microsoft Project (MSP). Experience with full product lifecycle with understanding of development lifecycle and various technology methodologies that support that lifecycle. Extensive Project Management Skills (Minimum 5 years) Project/Program Planning skills; Financial Management Skills; Scope Management skills; Time management skills, Quality Management skills; Risk and Issue management skills; Project Budgeting skills; Integration Management skills; Human Resource Management skills; Communication skills; Report writing skills.</p>	<p>10</p>	<p>5 = More than 10 Years</p> <p>4 = 6 to 10 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>



<p>2.3. Business/System Analyst Qualifications</p> <p>A minimum of a National Diploma/NQF6 in Information Technology/Computer Science or any related field. Plus, Business / System Analysis certifications would be essential.</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Business / Systems Analysis specific certification</p> <p>4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Business / Systems Analysis specific certification</p> <p>3 = National Diploma/NQF6 plus Business / Systems Analysis specific certification</p> <p>2= Matric plus Business / Systems Analysis specific certification</p> <p>1= Matric without Business / Systems Analysis specific certification</p>
<p>2.4. Business/System Analyst Experience</p> <p>Desirable or equivalent minimum of 5 years' experience in Business System Analysis, business process management and business process engineering. Experience with SDLC, Agile and other system development methodologies. Experience in ICT solutions delivery, business logic modelling, design and implementation. Experience working with multiple applications/ systems preferred. Software testing experience and</p>	<p>10</p>	<p>5 = More than 10 Years</p> <p>4 = 6 to 10 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>



<p>knowledge of QA testing methodologies and the test lifecycle.</p>		
<p>2.5. Ivanti Senior System Engineer / Application Developer Qualification</p> <p>A minimum of a National Diploma/ NQF6 in Information Technology/Computer Science or any related field. Plus, Ivanti Classic, ITSM, and Ivanti 20.x Certification. ITIL V2 or V3 Foundation Certification.</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification.</p> <p>4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p> <p>3 = National Diploma/NQF6 plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p> <p>2= Matric plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p> <p>1= Matric without Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p>
<p>2.6. Ivanti Senior System Engineer / Application Developer Experience</p> <p>Minimum of 5 years of experience in Ivanti Service Manager, ITSM, Ivanti Voice,</p>	<p>10</p>	<p>5 = More than 10 Years</p> <p>4 = 6 to 10 Years</p> <p>3 = 5 Years</p>



<p>IVANTI Discovery, DSM, and Ivanti 20.x. Experience with Migrating Ivanti Classic and ITSM Platforms to Ivanti 20.x. Software testing experience and knowledge and experience with a variety of different test strategies and approaches (Exploratory, Ad-hoc, Boundary, Functional, Non-functional, etc.). Experience working with defect management. Ability to clearly communicate software issues and behaviour to development, product management, and operations</p>		<p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>
<p>3. Proven Technical Competencies (aligned to the services to be rendered)</p> <ul style="list-style-type: none"> • Submission of a detailed Project Approach and Methodology document: <ul style="list-style-type: none"> ○ Detailed Project plan with: <ul style="list-style-type: none"> ▪ Milestones ▪ Implementation Plan ▪ Deliverables; and ▪ Costing Schedule Etc. ○ Clear understanding of the context of the requirement ○ Clear strategy to the execution of the requirement • The methodology proposed needs to be innovative, including but not limited to the following— <ul style="list-style-type: none"> ○ Extensive and highly interactive stakeholder interactions 	<p>20</p>	<p>4 = Very Good (all of the following has been submitted: proof of proposed–approach, methodology; and proposed solution aligned to the services to be rendered)</p> <p>3 = Good (two of the following has been submitted: proof of proposed approach, methodology; or proposed solution aligned to the services to be rendered)</p> <p>2 = Average (one of the following has been submitted: proof of proposed–approach, methodology; or proposed solution aligned to the services to be rendered)</p> <p>1 = Poor (No proof of proposed approach and methodology; proposed solution)</p>



<ul style="list-style-type: none"> ○ Showcase the value of the approach, ○ Align the proposal with the goals of the stakeholders ○ Share examples of where similar methodologies have been implemented and succeeded • Proposed solution 		
Total	100	
Minimum Threshold	60	
Bidders who did not meet a minimum threshold of 60% on Technical Evaluation Criteria will be disqualified for further evaluation on price and specific goals.		

NOTE:

- *The bidders are expected to provide minimum of only one CV for the most experienced resource per role for evaluation.*
- *In instances where a bidder submitted more than one CV per role, only one CV for the most experienced resource per role will be considered for evaluation.*

Resource Experience Evaluation Criteria Scoring Calculation Formulae:

- Total Project Manager Score = (Project Manager Qualification + Project Manager Experience)
 - Total ICT Service Support (Senior IVANTI Consultant) Score = (ICT Service Support (Senior IVANTI Consultant) Qualifications + ICT Service Support (Senior IVANTI Consultant) Experience)
- Total Business/System Analyst score = (Business/System Analyst Qualifications + Business/System Analyst Experience)

Total Bidder Resource Score = Total Project Manager Score + Total ICT Service Support (Senior IVANTI Consultant) Score + Total Business/System Analyst Score

5.4 Stage 3: Preference Point System

In terms of Preferential Procurement Regulations, 2022, Regulation 4(1) the applicable Preference Point System for this tender is 80/20, Price (80), and Specific Goals (20). In terms of Regulation 4(2-4) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. The bidder must provide the relevant proof/ required documents for each preference point system indicated.

5.4.1 Pricing Evaluation

- The Service Provider must cost for the work to be done regarding license fees, system maintenance and support. For financial evaluation purposes, the service provider must provide a pricing schedule.
- The Financial Proposal must contain the financial proposal (SBD 3.3), which includes: cost for the work to be done regarding license fees, system maintenance and support, and the disbursement cost if applicable.
- The National Treasury reserves the right to negotiate rates submitted by bidders.

5.4.2 Specific Goals

For the purposes of this tender, the tenderer will be allocated points based on the goals stated and should be supported by proof/ documentation stated in Table 9 below.

Specific goals for the tender and points to be claimed are indicated in the table below:

The bidders who complied with the mandatory requirements and meet the minimum threshold of this bid were evaluated according to the Preference Point Scoring System as determined in the Preferential Procurement Regulations, 2022, pertaining to the Preferential Procurement Policy Framework Act, Act No 5 of 2000.

The following preference point system is applied to all the bids:



Table 5: Specific Goals

	Specific goals	Score	Required proof/ documents to be submitted for evaluation purposes
1.	<p>The company owned by people who are Youth.</p> <ul style="list-style-type: none"> • 100% company owned by people who are Youth = 5 points • ≥51% and <100% company owned by people who are Youth = 3 points • >0% and <51% company owned by people who are Youth = 1 point • 0% company owned by people who are Youth = 0 point 	5 points	<p>Proof of claim as declared on SBD 6.1 (one or more of the following will be used verifying the tenderer's status:</p> <ul style="list-style-type: none"> • Company Registration Certification/document (CIPC) • Company Shareholders certificate • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • B-BBEE Certificate of the tendering company. • Consolidated B-BBEE certificated if the tendering company is a Consortium, Joint Venture, or Trust (Issued by verification agency accredited by the South African Accreditation System). • Agreement for a Consortium, Joint Venture, or Trust.
2.	<p>The company is owned by Historically Disadvantaged Individuals (HDI) (Black).</p> <ul style="list-style-type: none"> • 100% company owned by HDI = 5 points • ≥51% and <100% company owned by HDI = 3 points • >0% and <51% company owned by HDI = 1 point • 0% company owned by HDI = 0 point 	5 points	
3.	<p>The company owned by HDI (Women).</p> <ul style="list-style-type: none"> • 100% company owned by HDI = 5 points • ≥51% and <100% company owned by HDI = 3 points • >0% and <51% company owned by HDI = 1 point 	5 points	



	<ul style="list-style-type: none"> 0% company owned by HDI = 0 point 		
4.	<p>The company owned by HDI (people who are disabled).</p> <ul style="list-style-type: none"> 100% company owned by HDI = 5 points ≥51% and <100% company owned by HDI = 3 points >0% and <51% company owned by HDI = 1 point 0% company owned by HDI = 0 point 	5 points	

***Note:**

Points will be allocated based on % ownership of the Company (Please attach proof/ required documents).

Failure to submit the required proof will lead to a zero (0) status level for non-compliant service providers. The points scored by a bidder in respect of the points indicated above will be added to the points scored for price. Only a bidder who has completed and signed the declaration part of the preference claim form will be considered. National Treasury may, before a bid is adjudicated or at any time, require a bidder to substantiate claims made regarding the required proof. A trust, consortium, or joint venture will qualify for points as a legal entity, provided that the entity submits the required proof.

5.4.3 Timeframe (Project Duration)

The successful bidder will be appointed for a period of three (3) years from the date of appointment.



5.4.4 Implemented Landscape

Support must be provided at various locations where NT is located which include but not limited to the following:

- SITA Centurion – John Vorster Drive, Centurion
- 40 Church Square – PTA CBD (Head Office)
- 120 Plein Street – CPT CBD (Small Footprint)
- Remotely online

6. TERMS AND CONDITIONS OF THE BID

- The successful service provider(s) and its employees or consultants will have to undergo a mandatory security clearance process. NT reserves the right to cancel, terminate or, not award the contract to a company that either doesn't avail itself for security clearance or fails such. The successful supplier will also enter into a non-disclosure agreement with the National Treasury.
- The CVs presented as part of the bid must be available for providing the service at National Treasury sites. If the resource is not available, NT reserves the right to accept or reject the replacement CVs presented. The service provider will be responsible for providing the desired replacement resources should the replacement CVs be rejected by NT.
- NT has the right to terminate the contract as and when the services are no longer required or as soon as the allocated funds are depleted.
- The service provider must undertake to conclude an agreement(s) which must consist of, but is not limited to the following:



- A clear description of the required services and deliverables
- Defined payment terms for the service.
- Agreement that the successful service provider shall be a single point of contact for the service. In a case where the service provider outsourced services, the service provider will manage the National Treasury outsourced company directly.
- Agreement that the successful service provider must provide qualified personnel who have undergone necessary training and certification to provide the required service. Should the skill/s not be available in-house, this must be specified.
- Successful bidder(s) must be able to commence work as soon as the agreement(s) have been signed.
- National Treasury reserves the right to screen and vet shortlisted service providers before the appointment.
- The National Treasury reserves the right to terminate the contract if there is clear evidence of deviations from the agreed specifications.
- National Treasury reserves the right to communicate with the service provider pertaining to information submitted on the closing date and time.



7. ANNEXURE A1: CURRICULUM VITAE TEMPLATES

Notes:

- The CV format provided must be strictly adhered to. Non-compliance will result in the CV being rejected.
- The CV shall not be longer than 4 x A4 s. A Minimum font size of 10 shall be used.
- The CVs must specifically and clearly address the service requirements for evaluation purposes.
- Only CV's may be submitted if the employee is employed or affiliated with the company submitting the CV. Proof of employment or affiliation with the company could be requested.
- CV's must be signed by the proposed resource.
- Resource may only be submitted by one company.

NOMINATED INDIVIDUAL'S CV

Nominated Individual's First Names	
Nominated Individual's Surname	
Nominated Individual's Date of Birth (yyyy-mm-dd, e.g. 2010-03-04)	
Nominated Individual's Nationality	
Nominated Individual's ID Number or Passport Number	
Service Provider's Name	
Reference Number of Nominated Individual	



<p>Pen Portrait</p> <p>(Describe below, in a maximum of 50 words, significant highlights of your professional experience and achievements. Please type the description in the field below)</p>

Education/Qualifications			
Institution	From Date	To Date	Qualification Obtained (Include the discipline e.g. BSc Computer Engineering)

Language Skills			
(Enter the languages below and indicate your competency: level, excellent, average, or basic.)			
Language	Reading	Speaking	Writing

Membership of Professional Bodies
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NT002-2025: APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES, SERVICES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD

(Describe in full, do not use acronyms or abbreviations)

Other Skills (e.g. Business Communication, Technical writing, etc.)	
Present Position in Service Provider's Organisation	
Years with the in-Service Provider's Organization	

Professional Experience (work history in descending order of years')			
From Date	To Date	Company/Organisation	Position

Areas of Specialisation



NT002-2025: APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES, SERVICES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD

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Other Relevant Information (e.g. publications)

Full Current Contact Details of Three References to be Provided				
Full Names	Position	Company/ Organizati on	Telephone No. (with country and	Cell Phone No. (With country code)

<p>Declaration by the Nominated Individual Described in this CV.</p> <p>I declare that the above information is accurate and can be supported by documents and references on request. I declare that my CV is not included in the proposal of any other service provider.</p>		
Name	Signature	Date

Approved by the Service Providers Submitting the Bid		
Service Provider's Name		
Service Provider's Representative's		
Name	Signature	Date



NT002-2025: APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES, SERVICES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD

Notes:

When completed, print a copy, and sign every page. Note each page must be signed by the nominated individual whose details are given, and a representative of the service provider submitting the bid. Submit the signed copy as part of the bid.



8. ANNEXURE A2: DETAILS OF SERVICE PROVIDER

8.1 SERVICE PROVIDER

Item	Detail	Description
Service Provider's Name		Name of the organisation or individual submitting
Central Supplier Database (CSD) Number		Reference number for the CSD system
Service Provider's Postal Address		Box number
		Suburb
		Postal code
Service Provider's Street Address		Number and street name
		Suburb
		Town/city
		Postal code
Service Provider's Telephone Number		Code and number, e.g., 012 488
Service Provider's Facsimile Number		Code and number, e.g., 012 488
Service Provider's		Company registration number if Applicable
Service Provider's VAT Registration		If applicable
Service Provider's SARS Tax Number		



Service Provider's Tax Clearance Certificate Expiry Date		yyyy-mm-dd, e.g., 2010-03-04
Contact Person		Contact person for this bid
Contact Person's Cell Phone Number		Number, e.g., 088 345 6789
Contact Person's Email Address		
Name of Person Signing this Bid		Full name
Date of Signature of the Bid		yyyy-mm-dd, e.g., 2010-03-04
Capacity Under which this Bid is Signed		Director, member, individual, etc.
Signature		Sign here

Notes:

- If the postal address is the same as the street address, leave the postal address fields blank.
- When completed, print a copy and sign. Submit the signed copy as part of the bid.
- This form must be completed irrespective of whether the service provider is an individual or an organisation.



9. ANNEXURE A3: SERVICE PROVIDER PROFILE

9.1 SERVICE PROVIDER

Summary of Service Provider's Relevant Experience (maximum 10 one sentence bullet points)
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Summary of Service Provider's Areas of Expertise (maximum 10 one sentence bullet points)
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>



Locations of Service Provider's Offices in SA (names of towns only)

Service Provider's Support Structure (administration, secretarial etc.)

Service Provider's Financial Data (current asset value, P&L summary)

Service Provider's Date of Foundation (yyyy-mm-dd, e.g., 2010-03-04)

Service Provider Name	
Representative's Name	

Representative's Signature	
Date of Signature	

Notes:

When completed, print a copy and sign. Submit the signed copy as part of the bid.



10. ANNEXURE A4: LIST OF SIMILAR PROJECTS AND CLIENTS CONTACT TEMPLATE

Project Description	Scope of Work	Total Value	Total Resources provided by the bidder on the project	Breakdown of the resources and roles	Duration (Start date -end date)	Client Contact Details



NT002-2025: APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES, SERVICES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD

11. CONTACT DETAILS

Email : NTAdministrativeTenders@treasury.gov.za



Special Conditions of Contract

NT002-2025

**NT002-2025: APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND
MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES AND SUPPORT AND MAINTENANCE
OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND
COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD**

CLOSING DATE: 07 MARCH 2025 AT 11:00 AM

VALIDITY PERIOD: 90 DAYS

S U P P L Y C H A I N M A N A G E M E N T

A LEGISLATIVE AND REGULATORY FRAMEWORK

This bid and all contracts will be subject to the General Conditions of Contract issued in accordance with of the Treasury Regulations 16A published in terms of the Public Finance Management Act, 1999 (Act 1 of 1999), Preferential Procurement Policy Framework Act (PPPFA), NT SCM policy and any other applicable legislation. The Special Conditions of Contract are supplementary to that of the General Conditions of Contract. Where, however, the Special Conditions of Contract are against the General Conditions of Contract, the Special Conditions of Contract takes precedence.

B. EVALUATION PROCESS AND CRITERIA

1. EVALUATION PROCESS

1.1. All bids will be evaluated in terms of functionality and preference point system which comprises of the following:

1.1.1 Phase 1A: Initial screening process

a) In terms of National Treasury Instruction No. 4A of 2016/2017 regarding the National Central Supplier Database (CSD), all bidders must register on the CSD to provide the following information to be verified through the CSD:

- Business registration, including details of directorship and membership.
- Bank Account holder information.
- In the service of the State status.
- Tax compliance status.
- Identity number.
- Tender default and restriction status; and
- Any additional and supplementary verification information communicated by National Treasury.

b) **Administrative compliance**

Duly completed and signed.

- Invitation to bid – SBD 1
- Pricing schedule SBD 3.3
- Declaration of interest–SBD 4
- Preference Point Claim Form – SBD 6.1
- Provide ID copies for all managing Directors.
- CIPC

1.1.2 Phase 1B: Functionality evaluation as per attached Terms of Reference

- a) Bids will be evaluated strictly according to the bid evaluation criteria stipulated in the terms of reference.
- b) Bidders must, as part of their bid documents, submit supportive documentation for all technical requirements as indicated hereunder. The panel responsible for scoring the respective bids will evaluate and score all bids based on their submissions and the information provided.
- c) Bidders will not rate themselves but need to ensure that all information is supplied as required. The Bid Evaluation Committee (BEC) will evaluate and score all responsive bids and will verify all documents submitted by the bidders.
- d) The panel members will individually evaluate the responses received against the following criteria as set out below:
- e) Individual value scores will be multiplied with the specified weighting for the criterion to obtain the marks scored for all elements. These marks will be added and expressed as a fraction of the best possible score for all criteria.
- f) The technical proposal will be scored out of 100 points, with a minimum threshold of 60% required. Bidders that do not meet the minimum functionality threshold of 60% will not be consider for further evaluation. Bidders will be evaluated on the functionality evaluation criteria in a table below:

Table 1: Summary of functional/Technical Evaluation Criteria

A bidder that scores less than **60%** points out of **100%** as per categories in respect of **functionality** will be regarded as submitting a non-responsive proposal and will be disqualified.

Evaluation Criteria	Weight	Scoring Criteria
<p>1. Company Experience</p> <p>The bidder must have previously successfully supplied or installed or configured or maintained and supported similar projects in the past 5 years.</p> <p>The list and evidence must address the following:</p> <p>Description of the project, Client name, Client contact (i.e., email and office number), Project start date, project end</p>	20	<p>5- Excellent 5 or more reference letters submitted reflecting all items and discussed in detail.</p> <p>4- Very Good 4 reference letters submitted reflecting all items.</p> <p>3 -Good 3 reference letters submitted reflecting all the items.</p> <p>2- Average 2 reference letters submitted reflecting all items.</p> <p>1-Poor 0-1 reference letters submitted reflecting all items</p>

<p>date, and contract value. Furthermore, attach a completion certificate signed by the client or a letter from the client confirming the successful completion of the project. completion certificate or reference letters should be on referral client letterhead and signed.</p> <p>NB: Letter that does not reflect all required items will be allocated the lowest score.</p>		
<p>2. Resource Experience (companies should indicate their level of skills to the product incl. an indication of their years of relevant experience relating thereto).</p> <p>NB: If one of the two required qualifications (National Diploma/NQF6 or certifications) is submitted, the bidder will be allocated the lowest score</p> <p>NB: <u>Total Bidder Resource Score</u> = Total Project Manager Score + Total ICT Service Support (Senior IVANTI Consultant) Score + Total Business/System Analyst Score</p>		
<p>2.1. Project Manager Qualification</p> <p>A minimum of a National Diploma/NQF6 in ICT and related fields (IT, Computer Science, and Engineering discipline). Plus, equivalent Certified Project Management Certifications</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Project Management certification</p> <p>4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Project Management certification</p> <p>3 = National Diploma/NQF6 plus Project Management certification</p> <p>2= Matric plus Project Management certification</p> <p>1= Matric without project management certification</p>

<p>2.2. Project Manager Experience</p> <p>Desirable or equivalent minimum of 5 years of experience, with at least five years of managing complex projects in a technical environment. Desirable or equivalent experience in Microsoft Project (MSP). Experience with full product lifecycle with understanding of development lifecycle and various technology methodologies that support that lifecycle. Extensive Project Management Skills (Minimum 5 years) Project/Program Planning skills; Financial Management Skills; Scope Management skills; Time management skills, Quality Management skills; Risk and Issue management skills; Project Budgeting skills; Integration Management skills; Human Resource Management skills; Communication skills; Report writing skills.</p>	<p>10</p>	<p>5 = More than 10 Years</p> <p>4 = 6 to 10 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>
<p>2.3. Business/System Analyst Qualifications</p> <p>A minimum of a National Diploma/NQF6 in Information Technology/Computer Science or any related field. Plus, Business / System Analysis certifications would be essential.</p>	<p>10</p>	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Business / Systems Analysis specific certification</p> <p>4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Business / Systems Analysis specific certification</p> <p>3 = National Diploma/NQF6 plus Business / Systems Analysis specific certification</p>

		<p>2= Matric plus Business / Systems Analysis specific certification</p> <p>1= Matric without Business / Systems Analysis specific certification</p>
<p>2.4. Business/System Analyst Experience</p> <p>Desirable or equivalent minimum of 5 years' experience in Business System Analysis, business process management and business process engineering. Experience with SDLC, Agile and other system development methodologies. Experience in ICT solutions delivery, business logic modelling, design and implementation. Experience working with multiple applications/ systems preferred. Software testing experience and knowledge of QA testing methodologies and the test lifecycle.</p>	10	<p>5 = More than 10 Years</p> <p>4 = 6 to 10 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>
<p>2.5. Ivanti Senior System Engineer / Application Developer Qualification</p> <p>A minimum of a National Diploma/ NQF6 in Information Technology/Computer Science or any related field. Plus, Ivanti Classic, ITSM, and Ivanti 20.x Certification. ITIL V2 or V3 Foundation Certification.</p>	10	<p>5 = Honours degree or Post Graduate Diploma (NQF 8) or higher plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification.</p> <p>4= Bachelor's Degree/ Advance Diploma (NQF 7) plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p>

		<p>3 = National Diploma/NQF6 plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p> <p>2= Matric plus Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p> <p>1= Matric without Ivanti Classic, ITSM, and Ivanti 20.x Certification and ITIL V2 or V3 Foundation Certification</p>
<p>2.6. Ivanti Senior System Engineer / Application Developer Experience</p> <p>Minimum of 5 years of experience in Ivanti Service Manager, ITSM, Ivanti Voice, IVANTI Discovery, DSM, and Ivanti 20.x. Experience with Migrating Ivanti Classic and ITSM Platforms to Ivanti 20.x. Software testing experience and knowledge and experience with a variety of different test strategies and approaches (Exploratory, Ad-hoc, Boundary, Functional, Non-functional, etc.). Experience working with defect management. Ability to clearly communicate software issues and behaviour to development, product management, and operations</p>	10	<p>5 = More than 10 Years</p> <p>4 = 6 to 10 Years</p> <p>3 = 5 Years</p> <p>2 = 3 to 4 Years</p> <p>1 = 1 to 2 Years</p>
<p>3. Proven Technical Competencies (aligned to the services to be rendered)</p> <ul style="list-style-type: none"> Submission of a detailed Project 	20	<p>4 = Very Good (all of the following has been submitted: proof of proposed—approach, methodology; and proposed</p>

<p>Approach and Methodology document:</p> <ul style="list-style-type: none"> ○ Detailed Project plan with: <ul style="list-style-type: none"> ▪ Milestones ▪ Implementation Plan ▪ Deliverables; and ▪ Costing Schedule Etc. ○ Clear understanding of the context of the requirement ○ Clear strategy to the execution of the requirement • The methodology proposed needs to be innovative, including but not limited to the following— <ul style="list-style-type: none"> ○ Extensive and highly interactive stakeholder interactions ○ Showcase the value of the approach, ○ Align the proposal with the goals of the stakeholders ○ Share examples of where similar methodologies have been implemented and succeeded • Proposed solution 		<p>solution aligned to the services to be rendered)</p> <p>3 = Good (two of the following has been submitted: proof of proposed—approach, methodology; or proposed solution aligned to the services to be rendered)</p> <p>2 = Average (one of the following has been submitted: proof of proposed—approach, methodology; or proposed solution aligned to the services to be rendered)</p> <p>1 = Poor (No proof of proposed approach and methodology; proposed solution)</p>
Total	100	
Minimum Threshold	60	
<p>Bidders who did not meet a minimum threshold of 60% on Technical Evaluation Criteria will be disqualified for further evaluation on price and specific goals.</p>		

Each panel member will rate each individual criterion on the score sheet using the following scale:

Value	Description
-------	-------------

5 - Excellent	Meets and exceeds the functionality requirements
4 - Very Good	Above average compliance to the requirements
3 - Good	Satisfactory and should be adequate for stated element
2 - Average	Compliance to the requirements
1 - Poor	Unacceptable, does not meet set criteria

- g) Individual value scores will be multiplied with the specified weighting for the criterion to obtain the marks scored for all elements. These marks will be added and expressed as a fraction of the best possible score for all criteria. This score will be converted to a percentage and only bidders that have met or exceeded the minimum threshold of 60% will be evaluated and scored in terms of pricing and specific goals as indicated hereunder.
- h) The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These marks will be added and expressed as a fraction of the best possible score for all criteria.

TERMS AND CONDITIONS

- The successful service provider(s) and its employees or consultants will have to undergo a mandatory security clearance process. The National Treasury reserves the right to cancel, terminate or, not award the contract to a company that either doesn't avail itself for security clearance or fails such. The successful supplier will also enter into a non-disclosure agreement with the National Treasury.
- The CVs presented as part of the bid must be available for providing the service at National Treasury sites. If the resource is not available, NT reserves the right to accept or reject the replacement CVs presented. The service provider will be responsible for providing the desired replacement resources should the replacement CVs be rejected by NT.
- The National Treasury has the right to terminate the contract as and when the services are no longer required or as soon as the allocated funds are depleted.
- The service provider must undertake to conclude an agreement(s) which must consist of, but is not limited to the following:
 - A clear description of the required services and deliverables
 - Defined payment terms for the service.
 - Agreement that the successful service provider shall be a single point of contact for the service. In a case where the service provider outsourced services, the service provider will manage the National Treasury outsourced company directly.
 - Agreement that the successful service provider must provide qualified personnel who

have undergone necessary training and certification to provide the required service. Should the skill/s not be available in-house, this must be specified.

- Successful bidder(s) must be able to commence work as soon as the agreement(s) have been signed.
- National Treasury reserves the right to screen and vet shortlisted service providers before the appointment.
- National Treasury reserves the right to terminate the contract if there is clear evidence of deviations from the agreed specifications.
- National Treasury reserves the right to communicate with the service provider pertaining to information submitted on the closing date and time.

2. EVALUATION CRITERIA

a) In terms of regulation 4 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated by the State on the 80/20-preference point for Specific goals in terms of which points are awarded to bidders on the basis of:

- The bid price (maximum 80 points)
- Specific goals (maximum 20 points)

b) The following formula will be used to calculate the points for price in respect of bidders with a Rand value up to R50 000 000:

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

Where

P_s = Points scored for price of tender under consideration;

P_t = Price of tender under consideration; and

P_{\min} = Price of lowest acceptable tender.

A maximum of 20 points may be awarded to a tenderer for the specific goals specified for the tender. The points scored for the specific goal must be added to the points scored

for price and the total must be rounded off to the nearest two decimal places. Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

c. The State reserves the right to arrange contracts with more than one contractor.

2.1 POINTS

The Preferential Procurement Regulations 2022 were gazetted on 4 November 2022 (No. 47452) with effect from 16 January 2023. The 80/20 preference points systems will be applied in accordance with the formula and applicable points provided for in the respective status level contributor tables in the Regulations.

Note to organs of state: 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.)

Table 2: Specific goals allocation table

	Specific goals	Score	Required proof/ documents to be submitted for evaluation purposes
1.	<p>The company owned by people who are Youth.</p> <ul style="list-style-type: none"> • 100% company owned by people who are Youth = 5 points • ≥51% and <100% company owned by people who are Youth = 3 points • >0% and <51% company owned by people who are Youth = 1 point • 0% company owned by people who are Youth = 0 point 	5 points	<p>Proof of claim as declared on SBD 6.1 (one or more of the following will be used verifying the tenderer's status:</p> <ul style="list-style-type: none"> • Company Registration Certification/document (CIPC) • Company Shareholders certificate • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • B-BBEE Certificate of the tendering company.
2.	<p>The company is owned by Historically Disadvantaged Individuals (HDI) (Black).</p> <ul style="list-style-type: none"> • 100% company owned by HDI = 5 points • ≥51% and <100% company owned by HDI = 3 points • >0% and <51% company owned by HDI = 1 point • 0% company owned by HDI = 0 point 	5 points	<ul style="list-style-type: none"> • Consolidated B-BBEE certificated if the tendering company is a Consortium, Joint Venture, or Trust (Issued by verification agency accredited by the South African Accreditation System). • Agreement for a Consortium, Joint Venture, or Trust.

3.	<p>The company owned by HDI (Women).</p> <ul style="list-style-type: none"> • 100% company owned by HDI = 5 points • ≥51% and <100% company owned by HDI = 3 points • >0% and <51% company owned by HDI = 1 point • 0% company owned by HDI = 0 point 	5 points	
4.	<p>The company owned by HDI (people who are disabled).</p> <ul style="list-style-type: none"> • 100% company owned by HDI = 5 points • ≥51% and <100% company owned by HDI = 3 points • >0% and <51% company owned by HDI = 1 point • 0% company owned by HDI = 0 point 	5 points	

***NB: Points will be allocated based on % ownership to the Company (main tendering entity). Please attach proof/ required documents.**

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.

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 with regard to preferences, in any manner required by the organ of state.

- a) The points scored by a bidder in respect of points indicated above will be added to the points scored for price.
- b) Bidders are requested to complete the various specific goals forms in order to claim points.

- c) Only a bidder who has completed and signed the declaration part of the preference claim form will be considered for specific goals.
- d) The National Treasury may, before a bid is adjudicated or at any time, require a bidder to substantiate claims made with regard to their specific goals.
- e) Points scored will be rounded off to the nearest 2 decimals.
- f) In the event that two or more bids have scored equal total points, the contract will be awarded to the bidder scoring the highest number of points for the bid. Should two or more bids be equal in all respects, the award shall be decided by drawing of lots.
- g) A contract may, on reasonable and justifiable grounds, be awarded to a bid that did not score the highest number of points.

3. MANDATORY REQUIREMENTS

3.1 A paper-based administrative evaluation will be carried out on all the bids received and if the under mentioned documentation is not signed or attached, such a bid will be eliminated from any further evaluation.

- a) Proof of company registration on Central Supplier Database Registration (CSD).
- b) CVs of the proposed/nominated resource(s) must be submitted in the prescribed format. CV's (**template provided**) must be signed by the proposed resource and not signed on behalf of the proposed resource. Unsigned or incomplete CVS and CVs submitted in a different template will not be considered. It should be noted that no consideration will be made to any bidder, that has provided profiles for their resources, which are also provided by another competitor in this same bid, this is considered collusive tendering. **Annexure A1 to A4 must be completed in full and signed.**
- c) Bidders must provide a letter/certification that indicates that they are a certified partner Ivanti Software Value Added Supplier.
- d) Bidder must provide proof/letter of being in good standing with the Original Software Manufacturer (OSM).
- e) In the case of a Joint Venture, Consortium, Trust, or Partnership a Valid Tax Clearance Certificate and/or SARS issued pin code for both companies must be submitted (which will be verified)
- f) In the case of a Joint Venture, Consortium, Trust, or Partnership, a signed teaming agreement must be submitted.
- g) In the case of a Joint Venture, Consortium, Trust, or Partnership a Consolidated Central Supplier Database Registration (CSD) or both companies CSD are required.

FAILURE TO ADHERE TO THE CONDITIONS OF THE BID WILL LEAD TO DISQUALIFICATION.

Additional Requirements (Not for elimination)

- Proof of valid registration with Compensation for Occupational Injuries and Disaster (COIDA).
- Valid work permit and existing security clearance for foreign nationals are compulsory. If not provided, the lowest score will be allocated.
- Bidders are required to submit proof of educational qualification(s) for all resources required.
- All copies of qualification(s) must be certified, and the certification must be valid for six (6) months from the required bid submission date. If not, the lowest score will be allocated.
- All foreign qualifications must be accompanied by South African Qualifications Authority (SAQA) certificate of evaluation. If not, the lowest score will be allocated.

4. TAX COMPLIANCE STATUS

Bids received from bidders with a non-compliant tax status may be disqualified with failure to update the Tax Status within 7 days.

5. VALUE ADDED TAX

All bid prices must be inclusive of 15% Value-Added Tax where applicable.

6. CLIENT BASE

- 6.1** National Treasury reserves the right to contact references during the evaluation and adjudication process to obtain information.

7. LEGAL IMPLICATIONS

Successful service providers will enter into a service level agreement with National Treasury

8. COMMUNICATION

National Treasury may communicate with bidders for, among others, where bid clarity is sought, to obtain information or to extend the validity period. Any communication either by letter or electronic mail or any other form of correspondence to any government official, department or representative of a testing institution or a person acting in an advisory capacity for the National Treasury in respect of this bid between the closing date and the award of the bid by the bidder is prohibited.

9. LATE BIDS

Bids submitted after the closing date and time will not be accepted for consideration and where applicable, be returned unopened to the bidder.

10. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Special Conditions by bidders will result in such bids being disqualified.

11. PROHIBITION OF RESTRICTIVE PRACTICES

- a. In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:
 - directly or indirectly fixing a purchase or selling price or any other trading condition;
 - dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
 - collusive bidding.
- b. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

12. FRONTING

- a. The National Treasury supports the spirit of broad-based black economic empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent, and legally compliant manner. Against this background the National Treasury condemns any form of fronting.

The National Treasury, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes, conduct, or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry be established during such enquiry/investigation, the onus will be on the bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid/contract and may also result in the restriction of the bidder/contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies the National Treasury may have against the bidder/contractor concerned.

13. TIMEFRAMES AND FORMAL CONTRACT

Successful bidder(s) will enter into a formal contract with the National Treasury.

14.1 FUNCTIONALITY/TECHNICAL PROPOSAL

Bid No: **NT002-2025**

Description: **APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD.**

Bid closing date and time: **07 MARCH 2025 AT 11H00AM**

14.2 PRICE/ FINANCIAL PROPOSAL

Bid No: **NT002-2025**

Description: **APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD.**

Bid closing date and time: **07 MARCH 2025 AT 11H00AM**

14.3 All bids must be submitted online on the Etender Portal

15 CONTACT DETAILS

For General enquiries: NTAdministrativeTenders@Treasury.gov.za

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO: NT002-2025
CLOSING TIME 11:00 AM ON 07 MARCH 2025	

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VALUE ADDED TAX</u>
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APPOINTMENT OF A SERVICE PROVIDER FOR THE RENEWAL AND MANAGEMENT OF IVANTI 2023 SOFTWARE LICENCES AND SUPPORT AND MAINTENANCE OF THE SOFTWARE FOR THE NATIONAL TREASURY (NT) INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) FOR A THREE (3) YEAR PERIOD

Services must be quoted in accordance with the attached terms of reference.

Total cost of the assignment (R inclusive VAT) R.....

NB: Bidders are also advised to indicate a total cost breakdown for this assignment.

The financial proposal for this assignment should cover for all assignment activities and outputs enumerated above.

- 2. Period required for commencement with project after acceptance of bid _____
- 3. Are the rates quoted firm for the full period? Yes/No
- 4. If not firm for the full period, provide details of the basis on which Adjustments will be applied for, for example consumer price index.

Any enquiries regarding bidding procedures may be directed to –

Department: National Treasury

Any enquiries regarding technical enquiries may be directed to –

Contact Person: NTAdministrativeTenders@Treasury.gov.za

PLEASE REFER TO THE ATTACHED TERMS OF REFERENCE FOR MORE INFORMATION.

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**

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

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

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

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 PREFERENCE POINT SYSTEMS

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

80/20

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

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, 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.

The 80/20 preference point system is applicable, corresponding points must also be indicated as such.

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
<p>The company owned by people who are Youth.</p> <ul style="list-style-type: none"> • 100% company owned by people who are Youth = 5 points • ≥51% and <100% company owned by people who are Youth = 3 points • >0% and <51% company owned by people who are Youth = 1 point • 0% company owned by people who are Youth = 0 point 	5 points	
<p>The company owned by Historically Disadvantaged Individuals (HDI) (Black).</p> <ul style="list-style-type: none"> • 100% company owned by HDI(Black) = 5 points • ≥51% and <100% company owned by HDI (Black) = 3 points • >0% and <51% company owned by HDI (Black)= 1 point • 0% company owned by HDI (Black)= 0 point 	5 points	

<p>The company owned by HDI (Women).</p> <ul style="list-style-type: none"> • 100% company owned by HDI(Women) = 5 points • ≥51% and <100% company owned by HDI (Women) = 3 points • >0% and <51% company owned by HDI (Women) = 1 point • 0% company owned by HDI(Women) = 0 point 	5 points	
<p>The company owned by HDI (people who are disabled).</p> <ul style="list-style-type: none"> • 100% company owned by HDI = 5 points • ≥51% and <100% company owned by HDI = 3 points • >0% and <51% company owned by HDI = 1 point • 0% company owned by HDI = 0 point 	5 points	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
 - One-person business/sole propriety
 - Close corporation
 - Public Company
 - Personal Liability Company
 - (Pty) Limited
 - Non-Profit Company
 - State Owned Company
- [TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

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

DEPARTMENT OF NATIONAL TREASURY



PLEASE COMPLETE QUESTIONNAIRE A OR B

**Contractors'/Suppliers' Questionnaire – Individuals:
Questionnaire A**

Please answer the questions by marking the appropriate column with an "X".
Please do not leave out any question relating to your specific circumstances.

Contractor/Supplier Name:	
Natural Persons:	
Surname:	
Initials:	
First two names:	
Title:	
ID number or passport number:	
Nationality:	
Income Tax reference number:	
Date of birth:	
If not a citizen of the RSA, furnish a certified copy of a work permit:	
Postal address and code:	
Residential address and code:	
Telephone numbers:	
Facsimile numbers:	
E-mail address:	
If in possession of a tax clearance certificate or exemption certificate (IRP30), furnish a certified copy thereof:	
Jurisdiction in which contractor is "ordinarily resident" i.e. place of permanent residence:	

DEPARTMENT OF NATIONAL TREASURY

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	Question	Yes	No
1.	Do you supply services on behalf of a Labour Broker?		
2.	Are you subject to the control or supervision of the National Treasury (NT)? Including, but not limited to, the following: <ul style="list-style-type: none"> • The manner of duties performed; • The hours of work; • The quality of work. 		
3.	Are you paid at regular intervals i.e. daily, weekly, monthly etc? (If the payments are made at regular intervals or by a rate per time period)		
4.	Will payment to you include any benefits? Including, but not limited to, the following: <ul style="list-style-type: none"> • Leave pay; • Medical aid; • Training; • Sick Leave. 		
5.	Will, or have you be/been in the full time employment of the NT?		
6.	Will you require of the NT to provide any equipment, tools, materials or office space, in order to fulfil the contract?		
7.	Do you supply these, or similar, services only to the NT and not to any other client or the general public?		
8.	Will you be required to work more than 22 hours per week?		
8.1	If "yes", will payment be made on an hourly, daily weekly or monthly basis?		
8.2.1	Will you work solely for the NT?		
8.2.2	Will you provide a written statement to this effect?		
Non-Residents of the RSA			
9.	Will you return to your jurisdiction of residence upon the termination of the contract?		
10.	Is the contract to exceed a period of three years?		
11.	Will you be returning to the jurisdiction of residence during the course of the contract? If so, for what periods of time?		
12.	Is your employer resident in the Republic of South		

DEPARTMENT OF NATIONAL TREASURY

Question		Yes	No
	Africa or does a permanent establishment or branch represent the employer in the Republic?		
13.	If a permanent establishment or branch represents the employer in the Republic, will your salary be paid from such permanent establishment or branch?		
14.	Will you be required to perform any work outside of the Republic?		
15.	Do you agree to submit copies of your passport should the NT, so require?		

PARTICULARS OF PERSON ACTING AS REPRESENTATIVE OF THE ENTERPRISE

I, the undersigned, confirm that the information provided above is accurate, and that while in receipt of payment from NT, will inform NT of any changes that take place pertaining the information provided above.

Representative's Full Names:	Capacity:	Contact number:
Signature:		Date:

DEPARTMENT OF NATIONAL TREASURY



PLEASE COMPLETE QUESTIONNAIRE A OR B

**Contractors'/Suppliers' Questionnaire – All Service Providers
(excluding Individuals): **Questionnaire B:****

Please answer the questions by marking the appropriate column with an "X".
Please do not leave out any question relating to your specific circumstances.

Contractor/Supplier Name:	
Corporate Contractors (including companies, close corporations and trusts):	
Registered name and furnish a certified copy of registration:	
Nature of legal entity:	
Trade name:	
Registration number:	
Date of incorporation:	
Jurisdiction of incorporation:	
Jurisdiction where effective management is performed:	
Income tax reference number:	
Employees' Tax reference number:	
Value Added Tax number and furnish a certified copy of VAT 103 Certificate:	
Postal address and code:	
Physical address and code:	
Telephone numbers:	
Facsimile numbers:	
E-mail address:	

DEPARTMENT OF NATIONAL TREASURY

Question		Yes	No
1.	Are you a "Labour Broker" i.e. do you provide payment for supplying the National Treasury (NT) with a person/s? If so, furnish a certified copy of an IRP30, which is valid for the period of the contract.		
2.	Is the service to be rendered personally by any person, who is a connected person, in relation to the entity? (For example a shareholder, member or their direct family)		
3.	Do you employ four or more employees on a full time basis throughout the year, excluding connected parties? If so, are these employees engaged in rendering the service to the NT? (For example secretarial employees would NOT be so engaged)		
4.	Would you be regarded as an employee of the NT if the service was rendered by the person directly to the NT, other than on behalf of the contractor?		
5.	Do you, the Company, Close Corporation or Trust receive any form of training supplied or paid for by NT? If "yes", please specify the nature and extent of the training:		
6.	Are you, the Company Close Corporation or Trust free to choose which tools or equipment, or staff, or raw materials, or routines, patents and technology to use in performing your main duties?		
7.	In order to perform your main duties, do you, or does such a person, Company, Close Corporation or Trust, use any tools or equipment supplied or paid for by NT? If "yes", please state the nature thereof:		
8.	Are you subject to the control or supervision of the NT, as to the manner in which, or hours during which, the duties are performed or are to be performed in rendering the service?		
9.	Will the amounts paid or payable in respect of the service consist of, or include, earnings of any description, which are payable at regular daily, weekly, monthly, or other intervals?		
10.	Will more than 80% of your income, during the year		

DEPARTMENT OF NATIONAL TREASURY

Question		Yes	No
	of assessment, from services rendered, consist of or be likely to consist of amounts received directly or indirectly from any one client , or any associated institution, in relation to the client?		
11.	Does your contract contain any elements of an employment contract? [i.e. Job titles, reporting structure in organisation, fixed working hours, employment benefits, performance bonuses (excluding bonus and penalties for early or late delivery)]		
12.	Does your contract contain any clause that will enable you to receive payment, even if no work was done?		
13.	Have you ever been classified as a Labour Broker or personal services company (including Close Corporation and Trust) by SARS or any other client?		
14.	If the answer to question 13 was "yes", did anything change that no longer classifies you as a labour broker or personal services company? If "yes", elaborate:		

PARTICULARS OF PERSON ACTING AS REPRESENTATIVE OF THE ENTERPRISE

I, the undersigned, confirm that the information provided above is accurate, and that while in receipt of payment from NT, will inform NT of any changes that take place pertaining the information provided above.

Representative's Full Names:	Capacity:	Contact number:
Signature:		Date:

GOVERNMENT PROCUREMENT

GENERAL CONDITIONS OF CONTRACT

NOTES

The purpose of this document is to:

- (i) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (ii) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.

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 will form part of all bid documents and may not be amended.
- Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid (if applicable) and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

TABLE OF CLAUSES

1. Definitions
2. Application
3. General
4. Standards
5. Use of contract documents and information; inspection
6. Patent rights
7. Performance security
8. Inspections, tests and analysis
9. Packing
10. Delivery and documents
11. Insurance
12. Transportation
13. Incidental services
14. Spare parts
15. Warranty
16. Payment
17. Prices
18. Contract amendments
19. Assignment
20. Subcontracts
21. Delays in the supplier's performance
22. Penalties
23. Termination for default
24. Dumping and countervailing duties
25. Force Majeure
26. Termination for insolvency
27. Settlement of disputes
28. Limitation of liability
29. Governing language
30. Applicable law
31. Notices
32. Taxes and duties

General Conditions of Contract

1. Definitions

1. The following terms shall be interpreted as indicated:
 - 1.1 "Closing time" means the date and hour specified in the bidding documents for the receipt of bids.
 - 1.2 "Contract" means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
 - 1.3 "Contract price" means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
 - 1.4 "Corrupt practice" means the offering, giving, receiving, or soliciting of any thing of value to influence the action of a public official in the procurement process or in contract execution.
 - 1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
 - 1.6 "Country of origin" means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
 - 1.7 "Day" means calendar day.
 - 1.8 "Delivery" means delivery in compliance of the conditions of the contract or order.
 - 1.9 "Delivery ex stock" means immediate delivery directly from stock actually on hand.
 - 1.10 "Delivery into consignees store or to his site" means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
 - 1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.
 - 1.12 "Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable.

Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.

- 1.13 "Fraudulent practice" means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.
- 1.14 "GCC" means the General Conditions of Contract.
- 1.15 "Goods" means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
- 1.16 "Imported content" means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.
- 1.17 "Local content" means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.
- 1.18 "Manufacture" means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
- 1.19 "Order" means an official written order issued for the supply of goods or works or the rendering of a service.
- 1.20 "Project site," where applicable, means the place indicated in bidding documents.
- 1.21 "Purchaser" means the organization purchasing the goods.
- 1.22 "Republic" means the Republic of South Africa.
- 1.23 "SCC" means the Special Conditions of Contract.
- 1.24 "Services" means those functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.
- 1.25 "Written" or "in writing" means handwritten in ink or any form of electronic or mechanical writing.

- 2. Application**
- 2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.
- 2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.
- 2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.
- 3. General**
- 3.1 Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.
- 3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from www.treasury.gov.za
- 4. Standards**
- 4.1 The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.
- 5. Use of contract documents and information; inspection.**
- 5.1 The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance.
- 5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.
- 5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.
- 5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.
- 6. Patent rights**
- 6.1 The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.
- 7. Performance security**
- 7.1 Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in SCC.

- 7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.
- 7.3 The performance security shall be denominated in the currency of the contract, or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:
- (a) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or
 - (b) a cashier's or certified cheque
- 7.4 The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

8. Inspections, tests and analyses

- 8.1 All pre-bidding testing will be for the account of the bidder.
- 8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.
- 8.3 If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.
- 8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.
- 8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.
- 8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.
- 8.7 Any contract supplies may on or after delivery be inspected, tested or analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with

supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.

8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 23 of GCC.

9. Packing

9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

10. Delivery and documents

10.1 Delivery of the goods shall be made by the supplier in accordance with the terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified in SCC.

10.2 Documents to be submitted by the supplier are specified in SCC.

11. Insurance

11.1 The goods supplied under the contract shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified in the SCC.

12. Transportation

12.1 Should a price other than an all-inclusive delivered price be required, this shall be specified in the SCC.

13. Incidental services

13.1 The supplier may be required to provide any or all of the following services, including additional services, if any, specified in SCC:

- (a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
- (b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
- (c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
- (d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and

- (e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

13.2 Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the parties and shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

14. Spare parts

14.1 As specified in SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

- (a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and
- (b) in the event of termination of production of the spare parts:
 - (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
 - (ii) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

15. Warranty

15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

15.2 This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.

15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

15.4 Upon receipt of such notice, the supplier shall, within the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified in SCC, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

- 16. Payment**
- 16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.
- 16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfillment of other obligations stipulated in the contract.
- 16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.
- 16.4 Payment will be made in Rand unless otherwise stipulated in SCC.
- 17. Prices**
- 17.1 Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized in SCC or in the purchaser's request for bid validity extension, as the case may be.
- 18. Contract amendments**
- 18.1 No variation in or modification of the terms of the contract shall be made except by written amendment signed by the parties concerned.
- 19. Assignment**
- 19.1 The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.
- 20. Subcontracts**
- 20.1 The supplier shall notify the purchaser in writing of all subcontracts awarded under this contracts if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.
- 21. Delays in the supplier's performance**
- 21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.
- 21.2 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.
- 21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.
- 21.4 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.

21.5 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.

21.6 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without canceling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

22. Penalties

22.1 Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC Clause 23.

23. Termination for default

23.1 The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:

- (a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
- (b) if the Supplier fails to perform any other obligation(s) under the contract; or
- (c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

23.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.

24. Anti-dumping and countervailing duties and rights

24.1 When, after the date of bid, provisional payments are required, or anti-dumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable

difference shall on demand be paid forthwith by the contractor to the State or the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him

25. Force Majeure

25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

25.2 If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

26. Termination for insolvency

26.1 The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

27. Settlement of Disputes

27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.

27.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.

27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.

27.5 Notwithstanding any reference to mediation and/or court proceedings herein,

(a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and

(b) the purchaser shall pay the supplier any monies due the supplier.

28. Limitation of liability

28.1 Except in cases of criminal negligence or willful misconduct, and in the case of infringement pursuant to Clause 6;

(a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss

or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and

- (b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

29. Governing language

29.1 The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.

30. Applicable law

30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.

31. Notices

31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice

31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32. Taxes and duties

32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.

32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.