



PUBLIC INVESTMENT
CORPORATION®

Est. 1911

PIC001/2020: REQUEST FOR PROPOSAL TO APPOINT A SUITABLY QUALIFIED BIDDER TO ADMINISTER PAYROLL FUNCTION FOR A PERIOD OF THREE (3) YEARS

The Public Investment Corporation (PIC) is a registered Financial Service Provider (FSP) and a public entity, wholly owned by the South African Government. PIC invests funds on behalf of public sector entities. Among the PIC's clients are the Government Employees Fund ("GEPF"), Unemployment Insurance Fund ("UIF") and Compensation Fund ("CP").

In order to preserve its institutional memory, the PIC has a responsibility to keep, protect, and secure its records.

As such, this RFP seeks to identify a suitably qualified and experienced service provider to offer a payroll administrative function for PIC for a period of three years. The selected Bidder will be required to offer the following services:

- Managing payroll administrative function
- Improve business efficiencies in the payroll services value chain
- Ensure compliance and by making sure that payroll administration and management activities are accurate, secure, and accessible
- Having the right level of skill set on-board
- Setting up and maintaining payroll records
- Filing payroll tax returns with SARS
- Provide payroll reports
- Administer statutory returns including PAYE, SDL and UIF

Closing date for the bid submission is **21 May 2020, at 11:00 AM**

No late submission will be accepted.

Submission arrangement has been changed from physical documents to soft copy via E-mail

For Enquiries and Submission at: **tenders@pic.gov.za**

**BID NO (PIC001/2020): REQUEST FOR PROPOSAL TO
APPOINT A SUITABLY QUALIFIED BIDDER FOR THE
PROVISION OF HR PAYROLL ENTERPRISE SERVICES AND
PAYROLL SOLUTION IMPLEMENTATION FOR THE PERIOD
OF THREE (3) YEARS WITH THE OPTION TO EXTEND FOR
ANOTHER TWO (2) YEARS**

Bid Number : PIC001/2020
Closing Date : 21 May 2020
Closing Time : 11:00 am
Place of Submission : tenders@pic.gov.za

Validity period of bid: 180 days

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1 DEFINITIONS AND ABBREVIATIONS

- 1.2 **B-BBEE** status level of contributor means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of good practice on Black Economic Empowerment, issues in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 1.3 **Bid** means a written offer in a prescribed or stipulated form in response to an invitation by PIC for the provision of goods and services, through price quotations, advertised competitive tendering processes or proposals;
- 1.4 **BBBEE Act** means the Broad Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 1.5 **Consortium or joint venture** means an association of persons for the purpose of combining their expertise, property, capital, skill and knowledge in an activity for the execution of a contract;
- 1.6 **Contract** means the agreement that results from the written acceptance of a bid by the PIC and successful negotiation and signature of same by both parties delegated authorities;
- 1.8 **Functionality** means the measurement according to predetermined norms, as set out in the bid documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a bidder;
- 1.9 **Management** means an activity inclusive of control and performed on a daily basis, by any person who is a principal executive officer of the company, by whatever name that person may be designated, and whether or not that person is a director;
- 1.10 **Ownership** means the percentage ownership and control, exercised by individuals within an enterprise;
- 1.11 **Validity Period** means the time period for which price quotation for the provision of goods and services shall remain valid, in this case, being a period of 120 (one hundred and twenty) days;

- 1.12 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000 (Act No 5 of 2000);
- 1.13 **SANAS** means the South African National Accreditation System;
- 1.15 **POPIA** means the Protection of Personal Information Act, 2013 (Act No 4 of 2013)
- 1.18 **POPI** means the Protection of Personal Information Act
- 1.21 **RFI** means Retirement Funding Income
- 1.22 **RA** means Retirement Annuity
- 1.23 **SDL** means Skilled Development Levy
- 1.24 **PCI** means Payment Card Industry Data Security Standard

2 INTRODUCTION

- 2.1 The Public Investment Corporation (PIC) is an asset management company wholly owned by the government of the Republic of South Africa duly represented by the Minister of Finance. The PIC manages investments on behalf of public sector funds which include Government Employees Pension Fund (GEPF), Unemployment Insurance Fund (UIF) and Compensation Fund.
- 2.2 Established in 1911, the PIC ranks amongst the best and most successful asset management firms in the world and is by far the biggest in Africa. The PIC runs one of the most diversified portfolios, which is made-up of multiple asset classes. These asset classes include listed equities, real estate, capital market, private equity and impact investing. Through listed investments, the PIC controls over 10% of the Johannesburg Stock Exchange and has direct and indirect exposure to almost all sectors of the South African economy.
- 2.3 The corporation has a mandate to invest in the rest of the African continent and beyond. Over and above generating financial returns for clients, through its impact-investing programme, the PIC seeks to generate social returns by investing in projects that ensure inclusive growth. The PIC supports the United Nations' Sustainable Development Goals and considers environmental, social and governance issues in all its investments.
- 2.4 The PIC manages assets exceeding R2 trillion; and as the leader in the Asset Management industry, thrives to meet and exceed its clients' expectations.

3 BACKGROUND

3.1. PIC HR requires HR payroll enterprise services and payroll solution which offers powerful user-defined employee self-service reporting functionality and with sophisticated security features, this solution includes but not limited to the following:

- a. Managing payroll administrative function on behalf of PIC.
- b. Improve business efficiencies in the payroll services value chain
- c. Ensure compliance and by making sure that payroll administration and management activities are accurate, secure, and accessible
- d. Deploy appropriately skilled technical resources to implement support and maintain HR payroll enterprise services

4 DURATION OF THE APPOINTMENT

4.1 The contract will be for a period of three years subject to renewal up to a maximum of five years.

5 KEY DATES AND ACTIVITIES

No	Description	Date/Time
1	RFP is published	30/03/2020
3	Bidders to submit question	09/04/2020
4	PIC to respond to bidders written questions	14/04/2020
5	Closing date	21/04/2020 at 11h00

6 SCOPE OF WORK

6.1 In-scope

This section entails the scope of work for HR Payroll enterprise services and payroll solution implementation for a period of three (3) years with an option to extend for another two (2) years.

4.1.1. Payroll enterprise management services

The service provider must assist PIC with the following, but not limited to:

- a. Setting up and maintaining payroll records
- b. Filing payroll tax returns with SARS
- c. Provide payroll reports
- d. Statutory returns including PAYE, SDL and UIF
- e. Improve business efficiencies in the payroll services value chain
- f. Ensure compliance and by making sure that payroll administration and management activities are accurate, secure, and accessible
- g. Having the right level of skill set on-board
- h. A contact person should always be available telephonically and via e-mail during working hours to answer queries
- i. To distribute various set of review reports to be agreed upon.
- j. Be responsible for processing input from the PIC on the service provider's software.
- k. There needs to be urgency and importance of special runs.
- l. Must enable the PIC to be able to have remote access to print reports.
- m. Should issue a Dummy Pay slip on the first day of the new tax year which is the first of March each year.
- n. Must agree to the PIC's payroll dates as well as cut-off dates for submissions

4.1.2. HR payroll solution implementation approach

The table below highlights project phases and deliverables following project management methodology to implement HR payroll solution:

Project phase	Deliverables
Initiation	<ul style="list-style-type: none"> Below are the deliverables for this phase but not limited to the following: <ol style="list-style-type: none"> Project charter Project plan Business requirement System requirement specification Information security requirements Technical and Infrastructure document
Delivery	<ul style="list-style-type: none"> Below are the deliverables for this phase but not limited to the following: <ol style="list-style-type: none"> Test plans Test cases Solution testing (integration, functional, performance, User Acceptance Testing, vulnerability & penetration testing) Configuration and installation (Test and production environment) Data migration plan Data migration implementation Change management
Final delivery	<ul style="list-style-type: none"> Below are the deliverables for this phase but not limited to the following: <ol style="list-style-type: none"> Business handover

	b) Project closure
Maintenance and support	<ul style="list-style-type: none"> On-going maintenance and support

4.1.3. IT Project Management services

The service provider must provide IT project management services include the following:

- Project management documentation to track and monitor the scope, milestones, time and resources for the implementation of HR payroll solution (i.e. project plan, project charter, statement of work).
- Plan, acquire and setup subscription user licenses.
- Estimate and plan the provision of the data migration from data sources into new HR payroll solution.
- Project handover, documentation and data handover.
- Project management, deliverables delivered on time and budget.
- Plan training and development for the relevant stakeholders.

4.1.4. Change management

The service provider to assist PIC with managing organizational change of the new HR payroll solution:

- Providing activities and structured approach for ensuring that changes are thoroughly and smoothly implemented and that the benefits of change are achieved.

4.1.5. Maintenance and Support

- The service provider to provide ongoing support and maintenance of HR payroll solution, when required by PIC.

7 PRELIMINARY REQUIREMENTS

Bidders must indicate compliance with this requirement as follows - By ticking ✓ the relevant box "Comply" or "Not Compliant" in the event that no tick ✓ is made it will be accepted that the bidder is "Not Compliant".

The bidder(s) is expected to meet a minimum of 70% of the requirements (Business and Technical) tabled below in order to proceed to the next stage of the evaluation process:

Prospective bidder(s) must be able to deliver a HR payroll enterprise services and implementation of Payroll Solution with the following components:

The table below details business requirements that the solution must/should address:

7.1 Business Requirement

The table below details the business requirements that the solution must/should address:

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
1.	Payroll solution must have the capability to enable the user to be able to drive and enforce deadline dates to ensure that all input is received on time.				
2.	Payroll solution must have the capability to enable the user to be able to scrutinize all input received for accuracy and compliance to internal policies and procedures.				
3.	Payroll solution must have the capability to enable the user to be able to submit all input received and				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
	interface files generated from PIC's system to payroll service provider.				
4.	Payroll solution must have the ability to validate account number.				
5.	Payroll solution must have the capability to allow the user to add multiple pay runs per pay period. This means that you can add more than one payslip per employee per pay period. For example, in December you can create a normal payslip as well as a bonus payslip				
6.	Payroll solution must have the capability to enable the user to be able to input processed information.				
7.	After the user have captured input supplied by the PIC in the payroll system, the service providers' account manager does an on-screen check to ensure that input has been captured accurately.				
8.	The Service providers' account manager, I want to be able to verify inputs captured by the payroll administrator on screen to ensure input has been captured accurately.				
9.	Payroll changes are to be based on the response to payroll input queries				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
	and confirmation of what is sent for processing not selected input.				
10.	<p>The payroll solution must have the capability to allow the user to be able to perform final calculations and checks including but not limited to the following:</p> <ul style="list-style-type: none"> Recalculate and check provision for tax on bonus based on the amount provided to date and the number of months left in the tax year Recalculate and check Retirement Funding Income (RFI). Correct negative non-RFI if necessary. Check and correct employees over pension and Retirement Annuity (RA) limits. Check Skilled Development Levy (SDL) on company recon Check start dates and method linking on new employees. Check that all new and existing employees are linked to a job grade 				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
	<ul style="list-style-type: none"> Check termination dates and application of company policies on terminated employees 				
11.	The payroll solution must have the capability to allow the user to be able to print a summary report of all earnings, deductions and company contributions indicating totals for this period, previous period and the difference between the two periods.				
12.	The payroll solution must have the capability to allow the user to be able to allow the user to be able to print detail of variances for each earning, deduction and company contribution.				
13.	The payroll solution must have the capability to allow the user to be able to view items that are supposed to remain fixed on the payroll unless there are specific instructions to make changes, a listing of variances will be printed (e.g. Overtime, Bonuses, Advance, etc.).				
14.	The payroll solution must have the capability to allow the user to be able to view the reason for each variance (on fixed items) or each entry (on				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
	variable items) in the payroll input supplied by the PIC.				
15.	The payroll solution must have the capability to allow the user to be able to check external review reports and give feedback on input already processed. Service provider to send queries of all input I sent to confirm or if there were errors to be corrected before they can send 1st review reports.				
16.	The payroll solution must have the capability to allow the user to be able to resend amended review reports.				
17.	The payroll solution must have the capability to allow the user to be able to send approved remuneration reconciliation reports to the service provider.				
18.	The payroll solution must have the capability to allow the user to be able to transfer net salaries and selected third party payments.				
19.	The payroll solution must have the capability to allow the user to be able to generate payslips as well as Importing payslip files from payroll system to HR System as well.				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
Payroll enterprise management services expertise required					
20.	<p>As part of the review process the service providers account manager must be able to compile a query list:</p> <ul style="list-style-type: none"> • Query sheet include all input sent to the payroll officer to confirm if it's right or there are errors • To request clarification or additional information on incomplete input • To make the PIC aware of potential risks in the payroll 				
21.	The service provider customer contact person should always be available telephonically and via e-mail during working hours to answer queries in writing, especially during the period between the date on which input was received by the service provider and the date of the external review.				
22.	The service provider to distribute various set of review reports to be agreed upon.				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
23.	The service provider creates electronic transfer files for net salaries, statutory deductions, 3rd parties, all voluntary deductions as well as for any other payments.				
24.	Service provider process and review final changes (feedback on external review).				
25.	The service provider will be responsible for processing input from the PIC on the service provider's software				
26.	The service provider will be responsible for processing all inputs received from the PIC.				
27.	The service provider will be responsible for making changes as per PIC's response to review queries.				
28.	The service provider must be able to distribute a set of review reports including but not limited to the following (i.e. pay register report, variance report, payslip detail report, etc.)				
29.	The service provider will process and review final changes (feedback on external review) and resend amended review reports.				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
30.	The service provider will create electronic transfer files for net salaries and the balance of the third-party payments.				
31.	The service provider will prepare a set of standard reports (as agreed with the PIC) in PDF and MS Excel format. Both the PIC and the service provider must have access to a secure ftp application to submit anything payroll related.				
32.	The service provider will issue EMP201 reports.				
33.	The service provider will e-mail the electronic UIF declaration files to the Department of Labour via Certified mail.				
34.	Backup of service provider stored on service provider's cloud hosted network and on CD for the PIC.				
35.	The service provider is responsible for ensuring that the software is updated and in line with statutory requirements.				
36.	The service provider to update and process employee non-financial information on annual basis.				
37.	From the service provider, there needs to be urgency and				

No.	Business Requirements	Comply	Not Compliant	Comments	Reference Page on Proposal
HR payroll solution					
	importance of special run for, but not limited to: <ul style="list-style-type: none"> • Salary increases • Bonuses • Leave encashment • Immediate terminations • Ad hock reports requests. 				
38.	The service provider must enable the PIC to be able to have remote access to print reports.				
39.	The service provider should issue a Dummy Pay slip on the first day of the new tax year which is the first of March each year.				
40.	The service provider must agree to the PIC's payroll dates as well as cut-off dates for submissions i.e. 2nd for the 15th and the 22nd for the 30th of the month.				

7.2 Non-Functional Requirements

The table below details Information Security requirements that the solution must/should address:

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
No.	Description				
Security					
1.	Multi Factor Authentication (MFA) The system must have Multi Factor Authentication (MFA) as part of the minimum requirements for authentication. PIC Access control policies and standards must be adhered to.				
2.	Segregation of duties The system should cater for segregation of duties requirement including peer reviews based on the assigned roles. Only PIC should add or remove users on the system.				
3.	Data privacy The Payroll Solution must ensure data privacy to protect confidential information of PIC Personally Identifiable Information (PII) and to be compliant with Protection of				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
	<p>Personal Information Act (POPIA).</p> <p>All locations of PIC data should be clearly communicated.</p>				
4.	<p>Secure data wiping</p> <p>Cloud Exit strategy should ensure that the wiping of our data from all locations that resides with the service provider.</p> <p>The cloud provider should provide PIC with an attestation certificate that the data has been wiped from all their systems.</p> <p>Data should be transferred back to PIC in a Secure and readable format.</p>				
5.	<p>Audit log</p> <p>The Payroll Solution must have the capability for audit logging of all user activity events. The Payroll must support audit logging of all transactions at database and application-level. The audit trail of all Payroll Solution transactions must have at least the following but not limited to date, time, and user identity).</p>				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
	<p>The solution must have a tamper-proof audit logging capability and be able to demonstrate the chain of custody.</p> <p>PIC should be provided with read-only access to the logs.</p>				
6.	<p>Security Certifications and datacentre certifications.</p> <p>The Cloud Services Provider should provide a minimum of the following Security Certifications and Reports.</p> <ul style="list-style-type: none"> • PCI certification • Provide ISO27001 Security certifications for all hosting Data centers • Provide SOC 2 Reports (for SaaS application and hosting datacenter) every quarter or upon request by PIC 				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
7.	Attestation for code reviews The cloud provider should provide an attestation for the code reviews that were done on the payroll solution.				
8.	Pen-test report The Service Provider must be able to provide independent pen test reports for the hosting infrastructure and application (Attestation Reports).				
9.	Infrastructure and application auditing The Service Provider must be able to provide PIC with Rights to audit upon the request.				
10.	Rights to audit The Service Provider must be able to provide PIC with rights to audit upon the request such as cyclical transactional audits and forensic investigations.				
11.	OWASP threats The solution must be protected against the OWASP Threats.				
12.	DDoS attacks The cloud provider should have the necessary security measures				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
	to protect the payroll application against possible DDOS attacks.				
13.	Disaster recovery The Payroll solution must have a Disaster Recovery (DR) site to ensure Business Continuity of critical functions following a disruption.				
14.	Cloud data back-up The solution must be able to perform regular back-up, in order to restore the data to its original state before the disaster occurred. The cloud data back-up must be tested on a regular basis to make sure that the back-ups are working as expected. The service provider must provide assurance that the backups are tested in alignment with PIC policies, standards and procedures				
15.	Maintainability The Payroll solution must be maintainable with regards to the payroll application enhancement, security updates and patches to the environment				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
16.	Integrability <ul style="list-style-type: none"> The payroll solution must be able to be integrated with Documents Records Management (DRMS) SharePoint online or the latest SharePoint. The service provider is to link the leave accounts of the payroll system to that of the HR system. The service provider is to link the interest on savings with regards to the thirteenth cheque to the PIC's bank. 				
17.	Availability <p>The payroll solution should be available to PIC 24/7, 365 days a year.</p>				
18.	Compliance <p>The payroll solution must be compliant with the highest international audit compliance and statutory regulations.</p>				
19.	Performance				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
	<p>The payroll solution performance should be reasonable also considering of the network speed.</p> <p>The solution should be able to handle multi-user workload requests based on the current and future demands.</p>				
20.	<p>Capacity and scalability</p> <p>The payroll solution must scalable, it must have the ability to increase or decrease in performance and in response to changes in processing demands.</p> <p>The solution should be able to handle multi-user workload requests based on the current and future demands.</p>				
21.	<p>Reliability</p> <p>The payroll solution should be resistant to failure and a low defect rate. The solution should have the ability to perform required functions as required.</p>				
22.	<p>Usability</p> <p>The payroll solution must be user friendly and easy for the user to learn and understand the solution.</p>				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
23.	Integrity The solution must have a high level of data integrity to assure the accuracy and consistency of data over its entire life-cycle in the way which the solution stores, processes and retrieve the data. The integrity of data is also required while the data is in transit.				
24.	Cloud platform The payroll solution must be web based on a cloud platform.				
25.	Change management The service provider should assist PIC with the approach of preparing PIC with the change of using new payroll solution. The service provider must follow PIC change management process whenever applying.				
26.	Data migration The service provider should assist PIC with the data migration from the current payroll solution to new payroll solution in a secure manner, while maintaining the integrity of the data.				

Non-Functional Requirements		Comply	Not Compliant	Comments	Reference Page on Proposal
27.	<p>The service provider must be able to render an after-service to PIC after project delivery:</p> <ul style="list-style-type: none"> • Change management • Handover • Maintenance and support 				

7.3 Technical Requirements

The table below details the technical requirements that the solution must/should address:

Technical Requirements		Comply	Not Comply	Comments	Reference Page on Proposal
NO.					
1.	The payroll solution must be a SAAS., cloud-based solution.				

8 HR PAYROLL ENTERPRISE SERVICES AND PAYROLL SOLUTION IMPLEMENTATION CONSIDERATIONS

8.1 Minimum Requirements

The Bidder must:

- Have a minimum of 5 (five) years' experience in implementing and supporting similar solutions. The service provider must have implemented similar project in the last three years
- Provide a technical lead with a minimum of 5 years' experience implementing the proposed or similar solution. A technical lead CV must be provided.

9 PROJECT MANAGEMENT SERVICES

The Bidder should provide Project Management Services for the full implementation of the solution. The PIC further recognizes the importance of employing the correct delivery model from the onset of the project.

This will ensure that there is proper planning, phase identification and prioritization, improved coordination; reduced risk and the eventual execution is seamless.

The Bidder should also provide detailed description of their Project Management process/ methodology in sufficient detail to convey to the PIC that it is capable to implement its proposed service on time and on budget. The methodology should indicate clear stage gates which require approval and signoff, triggering payment on completion of key milestones.

The PIC expects the service provider to provide project documentation, from Project initiation document, project plan, requirements analysis, system architecture, solution documentation and design documents, test plans, training and technical documentation. The bidder shall clearly specify the proposed approach, methodology and plan for the implementation of the payroll enterprise services and of payroll solution.

As part of the project management services, the bidder(s) is expected provide the following in the proposal:

- **Programme Methodology** (including Programme Management & Governance, Change Management and Risk Management)
- **PIC services offering Readiness Assessment** (with recommendations)
- **Implementation Plan** (including Installation, Configuration, Testing and Deployment)
- **Post Implementation** - stabilisation, service delivery and support (including managed services life cycle)

10 CLIENT REFERENCES

Bidder should provide a list of at least **3 (three)** contactable clients references of companies where similar work has been successfully delivered within the last **5 (five)** years. Bidder must include reference letters from clients;

The PIC may use the references provided as a basis for which client sites will be visited. For shortlisted Bidders, the PIC may require assistance to arrange site visits and solution demonstration on request. References details must include the following:

- 10.1 The name of the entity, contact person, designation of contact, contact number, contract value and date; and
- 10.2 Reference letter from the client confirming the HR enterprise services and payroll solution implementation.

11 PROJECT TEAM EXPERIENCE

The Bidder **should** provide a clear summary of the company's staff compliment and detailed experience of the team to be assigned to this project as follows:

- The Technical Lead assigned for this project must have a **minimum** of 5 years' experience implementing the proposed or similar solutions;

- The technical lead response must include a table with Client, Project Implemented, Project Budget, Project Start and End Dates, Client Contact Details;
- The technical resources should be certified in the solution proposed and evidence of valid certification must be provided;
- The bidder(s) must provide resource for this project who have a **minimum** of 2 years' experience implementing similar solutions;
- CV's and valid solution certifications must be provided for the bidder(s) Technical Lead and project resources who will be assigned to the PIC project;
- The bidder must have additional resources with similar experience as technical lead to cover when one resource is not available in order to reduce key man dependency risk and to enable the need for business continuity.

12 SERVICE MANAGEMENT

The Bidder is expected to provide Service Level Agreements for Support and Maintenance for a period of 5 years stipulating and inclusive of the following:

- **Premium support should include the following:**
 - **99.9% Availability of the Solution**
 - **Service Levels:** Service Priority Levels and associated Turnaround times as follows:

Priority/ Severity	Description	Response Turn Around Time	Resolution Turn Around Time
1	Critical business impact Issue critical to PIC, unable to perform HR payroll functions, resulting in a critical impact on HR business operations.	Within 30 Minutes	Within 2 business hours
2	Significant business impact	Within 30 Minutes	Within 4 business hours

	Issue is significant to PIC HR payroll functions. Rapid resolution should be provided.		
3	Limited business impact Issue has an acceptable workaround not impacting significant or critical functions of HR payroll operations.	Within 1 hour	Within 8 business hours

- Relationship Management Activities; stereotype
- Services credit methodology in case of a Service Level Breach;
- Provide a year's worth of resource (for year 1) based support with the bidder's resource physically based at the PIC. The physical support must be **4 hours*2 days a month bi-weekly**; and
- Sample service level reporting.

13 EVALUATION CRITERIA AND METHODOLOGY

The evaluation criteria will be based on the following requirements:

- **Phase 1:** Compliance to administrative requirements
- **Phase 2:** Business Requirements
Bidder(s) who score below 70% of the business and technical requirements (section 7) will not proceed level of evaluations.
- **Phase 3:** Technical Functional Requirements (100 points).
Bidder, who score below 80 points, will not go through to the next level of evaluations.
PIC may request **presentations** and site visits from shortlisted bidders.
- **Phase 4: Pricing Proposal**
Bidder(s) who fail to comply phase 1 to 3 requirements will not proceed to the next phases
Price and BEE Evaluations (80/20 points). (Bidder who score 80 or more points out of 100 points allocated at technical evaluation will be subjected

to site visits and further evaluated on price and B-BBEE upon confirmation of infrastructure during site visits).

14 PHASE 1: ADMINISTRATIVE REQUIREMENTS

The Bidder will proceed to the next stage when they comply with the requirements stated herein below.

The bidder will proceed to the next stage when they comply with the following requirements:

Submission of:

- A valid and original Tax Clearance Certificate/Valid Tax Pin Number.
- BBEE status level certificate –Accredited by SANAS (If no BEE certificate is submitted/or BEE certificate submitted is not valid, no points will be allocated for BEE).
- EME's and QSE's –sworn Affidavit
- Signed and completed declaration of interest document
- Signed and completed SBD 1 – Invitation to Bid document
- Completed and signed Company Information document and submission of all the required documentation as stipulated in the company profile document
- Acceptance of the conditions as stipulated in the bid document
- Submission of all attached as per the bid evaluation criteria and the bid document and a separate pricing proposal.
- The CSD (Central Supplier Database) is a single source of all supplier information for all spheres of government and all suppliers engaging with the PIC should be registered on the CSD. **Kindly enclose your CSD registration report.**
- All the documents must be in PDF format.

15 PHASE 2: TECHNICAL / FUNCTIONAL SCORING CRITERIA

With regards to technicality / functionality, the following criteria shall be applicable, and the maximum points of each criterion are indicated in the table below:

Bidders must achieve the minimum threshold of 80% for technical/functional evaluation proceed to Price and BEE evaluation.

Bidders who obtain less than 80% will be declared non-responsive and therefore disqualified to proceed for further evaluation.

Technical / Functional Criteria		Weightings	
12.4 Compliance to the payroll enterprise services and of payroll solution implementation scope		55	
Bidder must illustrate current capability and capacity to meet payroll enterprise services and payroll solution implementation Business requirements (refer to Section 4 and 6)			
Enterprise services and of payroll solution implementation	Weight		Section in Proposal
Response to scope of work	15		
Response to: <ul style="list-style-type: none">• Business Requirements• System Requirement Specification• Technical Requirements• Security Requirements	40		
The Bidder must provide the above table as an attachment to the RFP response to the HR payroll enterprise services and of payroll solution implementation requirements.			

Technical / Functional Criteria	Weightings
<p>12.1 Programme Management</p> <p>Elements: Submission by bidder must include an adequate and clear plan on programme management (including assessment, migration and implementation) of payroll enterprise services and of payroll solution implementation.</p> <p>transitioning at the PIC.</p> <p>The proposed programme management plan must include details on the following:</p> <ul style="list-style-type: none"> • Programme Methodology (including Programme Management & Governance, Change Management and Risk Management) • Implementation Plan (including Installation, Configuration, Testing and Deployment) • Post Implementation - stabilisation, service delivery and support (including managed services life cycle) 	<p>15</p>

Technical / Functional Criteria	Weightings
---------------------------------	------------

12.2 Technical Lead – Years of experience in implementing payroll enterprise services and of payroll solution implementation.

5

The Technical Lead must have a minimum of five (5) years (e.g. from 2012 to 2017) technical lead experience on payroll solution implementation programmes as per scoring matrix below.

The supporting team must have minimum 5 years' experience in the security field including the relevant certifications such as CISSP, CEH and CISM.

Please provide a copy of the C.V. of the Technical Lead who will be responsible for the PIC payroll solution implementation programme. In addition, the table below must be completed and included in the bid proposal section with the C.V. Failure to include the table will result in non-consideration of the C.V

Client	Programme Implemented	Budget	Start Date	End Date	Relevance to Service Offerings	Client Contact Details

12.2 Supporting Team – Years of experience in implementing payroll enterprise services and of payroll solution implementation.							10
<p>The supporting team must have minimum 5 years' experience in the security field including the relevant certifications such as CISSP, CEH and CISM.</p> <p>Please provide a copy of the C.V. of the Technical Lead who will be responsible for the PIC payroll solution implementation programme. In addition, the table below must be completed and included in the bid proposal section with the C.V. Failure to include the table will result in non-consideration of the C.V</p>							
Client	Programme Implemented	Budget	Start Date	End Date	Relevance to Service Offerings	Client Contact Details	
Technical / Functional Criteria							Weightings
Technical / Functional Criteria							Weightings

<p>12.5 Service Level Agreement</p> <p>Bidder must:</p> <p>Propose SLAs inclusive of the following as per section 9:</p> <ul style="list-style-type: none"> - Premium support inclusive but not limited to the following: <ul style="list-style-type: none"> ○ 99.9% Availability of the Solution ○ Service Priority Levels and associated Turnaround times as per section 9. - Relationship Management Activities - Services credit methodology in case of a Service Level Breach; and - Sample service level reporting 	<p>5</p>
--	-----------------

Phase 3: PRICE AND BEE EVALUATION

In this stage of the evaluation, bidders that have qualified after the technical evaluation will be evaluated in terms of the 80/20 preference points system under section 2 of the Preferential Procurement Policy Framework Act, 2000, read with the Preferential Procurement Regulations 2017.

All Bidder to submit their pricing as per schedule below-

(a) Annual increases must not exceed CPI related to the specific year;

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

Where

P = Points scored for price of bid under consideration

Pt. = Rand value of bid under consideration

Pmin = Rand value of lowest acceptable bid

Points will also be awarded based to a bidder for attaining their B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points /20
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non- compliant Contributor	0

16 PRICING PROPOSAL

Bidder(s) are required to submit a proposal for all services outlined in the Scope of work. The costs for the Bidder's proposal should be submitted in a separate document in line with the Scope of Work identified. It is the responsibility of the Bidder(s) to ensure the accuracy of the pricing provided as part of the response.

Costs should include the complete, fixed costs (if not fixed please indicate and provide details) for the services requested, including but not limited to the following:

All costs should be completely reflected on the pricing proposal.

When completing the Pricing Bidder must take note of the following:

- All pricing (including services, resources, hourly rates charged etc.) to be quoted in South African Rand including VAT.
- Bidder(s) to incorporate pricing of Licensing fees.
- Pricing assumptions must cater for growth of PIC staff complement of plus/minus 400-600 employees.
- Pricing must show clearly the once off implementation cost and ongoing maintenance cost.

Pricing Model

Note: The price proposal must inclusive of **all software related costs**. The bidder must provide a detailed breakdown of all elements which make up the cost of the proposed software e.g. software license structure, services included in the license, number licenses etc.

The proposed cost must be inclusive of all required services to complete the **implementation** as per the requirements

Software cost		
Cost element		Total Cost Inc VAT
Once off		R
Software license renewal	Year 1	R
	Year 2	R
	Year 3	R
Sub Total 1.1		R

Implementation Cost		
Activity Deliverable	Number of Hours	Total Cost Inc VAT
Customization/Development		R

Testing		R
Migration of Data		R
Other Cost		R
Disbursement		
Sub Total 1.2		R

Post Implementation Support

Activity	Monthly	Annual Cost (Incl Vat)
Post Implementation Support		
Sub Total 1.3		R

Total Bid Price

Activity /Deliverables	Amount
SUB-TOTAL 1.1	
SUB-TOTAL 1.2	
SUB- TOTAL 1.3	
TOTAL BID INC VAT	

For the purpose of ease in evaluating the ***Functionality of bids***, Bidder are required to present their bid documentation under the following headings. Bidder(s) **MUST** annex the response as indicated below:

Reference	Title	Guideline
Section 1	Cover letter	Brief company background, services and expertise, contact name and details of delegate authorized to make representations for the organization.
Section 2	Administrative Requirements and Completed RFP Document	Completion of RFP document and submission of administrative requirements
Section 3	Scope of Work	Respond and cover all items presented for HR enterprise services and payroll solution implementation.
Section 4	Understanding of the PIC Requirements	Outline your understanding of the PIC Request for Proposal
Section 5	Programme Management Services	Respond and cover on how the project will be approached and planned.
Section 6	Bidder Experience	Provide summary of the company's experience in the nature of the services required and staff compliment and CV details/experience of the team to be assigned to this project.
Section 7	Client References	Provide a summary of client references
Section 8	Service Management	Should cover the proposed SLA, support and maintenance plan for a period of 5 years
Section 9	Pricing Proposal	Cover all costs in detail as per pricing proposal details

List of Shareholders

Name	ID No	SA Citizen	Race	Gender	Shareholding %

- 17.1 Points scored will be rounded off to the nearest two decimal places.
- 17.2 The bidder who scored the highest point will be awarded the bid.
- 17.3 In the event where two or more bidder scored equal points, the successful bidder must be the one scoring the highest preference points for BBBEE.
- 17.4 However, when functionality is part of the evaluation process and two or more bidder have scored equal points including equal preference points for BBBEE, the successful bidder must be the one scoring the highest for functionality.
- 17.5 Should two or more bidder be equal in all respects; the award shall be decided by the drawing of lots.

18.1 The PIC reserves the right not to accept the lowest priced bid or any bid in part or in whole.

18.2 Joint Ventures / Consortiums

18.2.1 The following information and documentation must be submitted:

- 18.2.1.1 All information stipulated in paragraph 10 under minimum and administrative requirements must be submitted by all parties involved in the Joint Ventures/Consortiums, including ownership and executive management information.
- 18.2.1.2 A percentage breakdown of the work allocation between the parties must be clearly indicated.
- 18.2.1.3 A formal signed agreement indicating the leading company as well as the other company roles and responsibilities must be submitted.
- 18.2.1.4 A skills transfer plan between the parties must be submitted.

18.3 Non-Commitment

- 18.3.1 The PIC reserves the right to withdraw or amend these terms of reference by notice in writing to all parties who have received the terms of reference prior to the closing date.
- 18.3.2 The cost of preparing of bids will not be reimbursed.

18.4 Reasons for rejection

- 18.4.1 The PIC reserves the right to reject bids that are not according to specification/Terms of Reference. Bidder must clearly indicate compliance or non-compliance with specification/Terms of Reference.
- 18.4.2 Bidder shall not contact the PIC on any matter pertaining to their bid from the time the bids are closed to the time the bid has been

adjudicated. Any effort by a bidder to influence the bid evaluation, bid comparisons or bid award decisions in any matter, may result in rejection of the bid concerned.

18.4.3 The PIC shall reject a submission if the Bidder has committed a proven corrupt or fraudulent act in competing for a particular contract.

18.4.4 The PIC may disregard any submission if that Bidder, or any of its directors -

18.4.4.1 have abused the Supply Chain Management (SCM) system of any Government Department/ institution;

18.4.4.2 have committed proven fraud or any other improper conduct in relation to such system;

18.4.4.3 have failed to perform on any previous contract and the proof thereof exists; and/or

18.4.4.4 Is restricted from doing business with the public sector if such a bidder obtained preferences fraudulently or if such bidder failed to perform on a contract based on the specific goals.

18.5 Cancellation of Bid

18.5.1 The PIC may prior to the award of a bid, cancel a bid for the following reasons -

18.5.1.1 due to changed circumstances, there is no longer a need for the goods or services requested;

18.5.1.2 funds are no longer available to cover the total envisaged expenditure;

18.5.1.3 no acceptable bids are received

18.5.1.4 unsuccessful contract negotiations

18.5.2 The PIC may after award of the tender but before conclusion of a contract, cancel a bid for the following reasons-

18.5.2.1 due to change of circumstances, there is no longer a need for the goods or services requested;

18.5.2.2 funds are no longer available to cover the total envisaged expenditure.

18.6 Clarifications

Any clarification required by a bidder regarding the meaning or interpretation of the document, or any other aspect concerning the submission, is to be requested in writing e-mail to tenders@pic.gov.za .

Clarifications questions must be provided by no later than 30 April 2020 and responses will be provided by 7 May 2020

18.7 Receipt of Bids

Each bid shall be in writing using non-erasable ink and shall be submitted on the official document of Bid issued with the bid documents. The bid shall be submitted in a separate sealed envelope with the name and address of the bidder, the bid number and title, the bid box number (where applicable), and the closing date indicated on the envelope. The envelope shall not contain documents relating to any bid other than that shown on the envelope.

The onus shall be on the bidder to place the sealed envelope in the official marked locked bid box provided for this purpose, at the designated venue, not later than the closing date and time specified in the bid notice.

Postal bids will be accepted for consideration only if they are received in sufficient time to be lodged in the appropriate bid box by the closing time for such bids, it being understood that PIC disclaims any responsibility for ensuring that such bids are in fact lodged in the bid box. Proof of posting of a bid will not be accepted as proof of delivery to the appropriate place for the receipt of bids. Documents submitted on time by Bidder shall not be returned and shall remain the property of the PIC.

18.8 Late Bids

Bids received late shall not be considered. A bid will be considered late if arrived only one second after 11h00 or any time thereafter. The tender box shall be locked at exactly 11h00. Bids received late shall be returned unopened. Bidder are therefore strongly advised to ensure that bids be despatched allowing enough time for any unforeseen events that may delay the delivery of the bid.

18.9 Presentations

The PIC may require presentations and/or site visits at a stipulated date and time from short-listed Bidder as part of the bid process.

18.10 Service Level Agreement (SLA)

- 18.10.1 The SLA will set out the administration processes, service levels and timelines.
- 18.10.2 The award of a tender shall always be subject too successful negotiation and conclusion of an SLA / contract. There will be no binding agreement between the parties if a contract has not been concluded.

18.11 Contracting

Bidders are advised that a valid contract will only come into existence between the PIC and the successful bidder after conclusion of successful negotiations and signature of the Contract by both parties' respective delegated authorities.

See **ANNEXURE B** for Contracting terms and conditions.

19 PART A SBD 1 INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE PUBLIC INVESTMENT CORPORATION					
BID NUMBER:	PIC001/2020	CLOSING DATE:	21 May 2020	CLOSING TIME:	11:00 AM
DESCRIPTION	SIGN-OFF CERTIFICATE FOR BID NO (PIC021/2019 ADVERTISEMENT): REQUEST FOR PROPOSAL TO APPOINT A SUITABLY QUALIFIED BIDDER FOR THE PROVISION OF HR PAYROLL ENTERPRISE SERVICES AND IMPLEMENTATION OF PAYROLL SOLUTION FOR THE PERIOD OF THREE (3) YEARS, WITH THE OPTION TO EXTEND FOR TWO (2) YEARS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
tenders@pic.gov.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL ADDRESS		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					

SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX]
	<input type="checkbox"/> Yes <input type="checkbox"/> No				<input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER PART B:3]
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, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	THE SUCCESSFUL BIDDER WILL BE REQUIRED TO SIGN A SERVICE LEVEL AGREEMENT.
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDER MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDER 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	BIDDER 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 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:

20 DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:

.....

2.2 Identity Number:

.....

2.3 Position occupied in the Company (director, trustee, shareholder²):

.....

2.4 Company Registration Number:

.....

2.5 Tax Reference Number:

.....

2.6 VAT Registration Number:

.....

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹ "State" means –

- a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- b) any municipality or municipal entity;
- c) provincial legislature;
- d) national Assembly or the national Council of provinces; or
- e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder: **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

.....

Name of state institution at which you or the person connected to the bidder is employed:

.....

Position occupied in the state institution:

Any other particulars:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where

applicable, may result in the disqualification of the bid.

2.7.2.1 If no, furnish reasons for non-submission of such proof:

.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / **YES / NO**
shareholders / members or their spouses conduct business with the state
in the previous twelve months?

2.8.1 If so, furnish particulars:

.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship **YES / NO**
(family, friend, other) with a person employed by the state and who may be
involved with the evaluation and or adjudication of this bid?

2.9.1 If so, furnish particulars:

.....
.....
.....

2.10 Are you, or any person connected with the bidder, aware of any relationship **YES/NO**
(family, friend, other) between any other bidder and any person employed
by the state/PIC who may be involved with the evaluation and or
adjudication of this bid?

2.10.1 If so, furnish particulars:

.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members of the **YES/NO**
company have any interest in any other related companies whether or not
they are bidding for this contract?

2.11.1 If so, furnish particulars:

.....

.....

.....

3. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Reference Number	Tax Number	State Number / Employee Personal Number

DECLARATION

I, _____ THE _____ UNDERSIGNED
(NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS
CORRECT.

I ACCEPT THAT THE PIC MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS
DECLARATION

PROVE TO BE FALSE.

.....

.....

Signature

Date

.....

Position

.....

Name of bidder

21 COMPANY INFORMATION

Please complete the following questionnaire:

1. Company Name:

2. Other Trading Names:

3. Type of Organization: (Public Company ('Limited'), Private Company ('(Pty) Ltd'), Close Corporations ('cc'))

4. Physical and Postal Address of the Company:

Postal Code:	Postal Code:

5. Contact Details

Contact Name	
Contact Number	
Cell Number	
Email Address	
Alternative Contact	
Email Address	
Contact Number	

6. Company Information

Average no. of employees:	
Average annual turnover:	
Type of Enterprise: (e.g. Generic, Qualifying small enterprise, Exempted Micro Enterprise)	
Industry in which the entity operates:	

7. Banking Details

Banker:	
Auditor:	
Year of Establishment:	
Registration number of entity:	
Sector:	

***A letter from your bank with a bank stamp or cancelled cheque must be submitted.**

8. Tax Registration Details:

Income Tax Reference Number:	
VAT Registration Number:	
PAYE Registration Number:	

9. List of Shareholders:

***ID Documents of the Board of directors/members, owners, shareholders or executive committee must be submitted.**

*** CIPC Documents must be attached.**

10. B-BBEE (Broad-based Black Economic Empowerment) Status Details:

Please tick the relevant box(es):

STATUS	INDICATION
<p>The company has been independently verified (assessed / rated / certified)</p> <p><i>Please submit the B-BBEE verification certificate.</i></p>	<input type="checkbox"/>
<p>The company is in the process of being verified. Please submit a letter from verification agency. (i.e. verification to be completed within a maximum of 2 months)</p>	<input type="checkbox"/>

22 DECLARATION

Bidder Name: _____

Signature: _____

Designation: _____

I declare that:

- All information provided is true and correct
- The signatory of the bid document is duly authorized
- Documentary proof regarding any bid issue, will, when required be submitted to the satisfaction of the PIC
PIC will upon detecting that:
 - The BBBEE status level of contribution has been claimed or obtained on a fraudulent basis;
 - Any of the conditions have not been fulfilled act against the bidder.

I understand that:

PIC may:

- Disqualify the bidder from the bidding process;
- Recover all costs, losses or damages it has incurred or suffered as a result of the bidder's conduct;
- Cancel the contract and claim any damages which has suffered as a result of having less favorable arrangements due to cancellation;
- Restrict the bidder, its shareholders and directors or only shareholders and directors who acted on fraudulent basis, from obtaining business from any organ or state for a period not exceeding 10 years after audi alteram partem (hear the other side) rule has been applied; and
- Forward the matter for criminal prosecution

Thus signed and accepted on this _____^{st / nd / rd / th} day of _____ ,
20____ at _____:

Who warrants his / her authority hereto

For and on behalf of:
