

**BID NO (PIC008/2017): REQUEST FOR PROPOSAL
TO APPOINT A SUITABLY QUALIFIED BIDDER FOR THE
PROVISION OF ENTERPRISE CONTENT MANAGEMENT,
WEBSITE AND INTRANET REDESIGN SERVICES FOR A
PERIOD OF FIVE (5) YEARS**

Bid Number : PIC008/2017
Closing Date : 18 October 2017
Closing Time : 11:00 am
Place of Submission : Public Investment Corporation SOC Ltd
Menlyn Maine Central Square
Cnr Aramist Ave & Corobay Ave Waterkloof Glen Ext 2

Compulsory Briefing Session: 26 September 2017

Time: 11:00- 12:00

Venue Public Investment Corporation SOC Ltd
Menlyn Maine Central Square
Cnr Aramist Ave & Corobay Ave Waterkloof Glen Ext 2
Second Floor

Validity period of bid: 120 days

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1 DEFINITIONS AND ABBREVIATIONS

- 1.1 **B-BBEE** means black broad-based economic empowerment;
- 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 **BBEE 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;
- 1.7 **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;
- 1.8 **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;
- 1.9 **Ownership** means the percentage ownership and control, exercised by individuals within an enterprise;
- 1.12 **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;

- 1.13 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000 (Act No 5 of 2000);
- 1.14 **SANAS** means the South African National Accreditation System; and
- 1.15 **IRBA** means the Independent Regulatory Board for Auditors.

2 INTRODUCTION

- 2.1. The Public Investment Corporation (PIC) is an asset management company and state owned asset management company, managing funds on behalf of various public sector funds, the largest being the GEPF. The PIC is empowered by its clients' mandates to invest funds on their behalf in various asset classes with an objective to obtain good returns, while it simultaneously advancing the developmental investment goal. The PIC is also mandated to invest in the rest of the African continent and beyond.

The PIC manages assets exceeding R1.8 trillion; making it the biggest asset manager on the continent in terms of assets under management.

PIC VISION

To be the leader in developmental investing for sustainable financial prosperity of our stakeholders

PIC MISSION

To be a key player, not only in the region, but also on the African continent, who consistently delivers on client mandates through direct investing for economic transformation, robust risk management, strategic partnerships and resource mobilisation.

PIC CULTURE AND VALUES

The PIC prides itself in the high-performance synergy of its over 350 strong team. We tackle our challenges as one, while respecting one another's individuality. We celebrate our cultural and experiential diversity, which positively contributes to our ability to invest wisely on behalf of South Africa's future.

WE CARE (Committed, Accountable, Respect, Empathy) and **WE DELIVER** (Diligence, Excellence, Leadership, Innovate/Integrity, Value, Efficient, Responsible/Reliable)

3 BACKGROUND

- 3.1. Enterprise content management by definition is a formalised means of organising and storing documents, and other content, (including unstructured content) that relate to the organisation's processes. The term encompasses strategies, methods, and tools used throughout the lifecycle of the content.
- 3.2. PIC implemented the Microsoft SharePoint Collaboration and ECM technology platform in 2013. The following services were scoped:
 - a. Pervasive board papers solution for Company Secretariat
 - b. Intranet for internal collaboration
 - c. Isibaya website and fund application portal
 - d. Properties website (Cancelled)
 - e. PIC website (Cancelled)
- 3.3. The first three of the above services were implemented; however challenges were experienced on the Isibaya website and fund application portal due to business workflow complexities. The Properties and PIC website services were cancelled.
- 3.4. The utilization of the implemented SharePoint services by business is very low due to weak design alignment with business needs and lack of change management during and after implementation.
- 3.5. SharePoint is an excellent Enterprise Content Management (ECM) solution which enables collaboration, information sharing, business intelligence (including Excel integration) and the intranet. For the PIC it will also be the appropriate extranet solution to collaborate with clients and other stakeholders.
- 3.6. The PIC Business Modernisation Strategy has recently been approved and ECM has been tabled as a critical programme to assist in streamlining, managing and governing collaboration of PIC information and data securely.
- 3.7. The key enterprise content delivery platforms that will be covered, for the purpose of the PIC, are as follows:
 - 3.6.1. **Intranet:** it provides organisational information, collaboration and services (including links to internal business applications);
 - 3.6.2. **Extranet:** separate private network for portals and access by clients, vendors/suppliers and other stakeholders. The extranet is similar to the intranet

i.e. a subset on internal information packaged appropriately for external stakeholders.

3.6.3. **Website:** showcasing PIC core businesses (Listed Investments, Unlisted Investments – Private Equity & Properties), support functions, services, publications and information.

3.8. The scope of work for the ECM RFP comprises of the following services:

3.7.1. Enterprise Content Management platform implementation;

3.7.2. Intranet, Extranet and Website Redesign;

3.7.3. Implementation Services;

3.7.4. Service Management - Support and Maintenance.

4 RFP OBJECTIVES

4.1. The objective of this RFP is to solicit proposals from prospective bidders with a proven track record of successful delivery of Enterprise Content Management, Internet (website), Extranet and Intranet using the Microsoft SharePoint platform in line with the PIC scope of work.

4.2. PIC would like to share content on a company wide scale as well as within stakeholder ecosystems in order to present vital information and relevant communication to PIC internal and external stakeholders.

5 ENTERPRISE CONTENT MANAGEMENT COMPONENTS

The PIC requires enterprise content management technologies which will enable the delivery and management of business information and data across the following five (5) lifecycle components:

- 5.1 **Capture:** In order to create, obtain and organize information. PIC content should be captured into the content management solution (i.e. entered into the organisation) by various means such as paper or electronic. Support for additional capturing capabilities such as recognition technologies (e.g. barcode and character recognition), forms processing, aggregation and indexing according to the PIC records management guidelines is imperative;
- 5.2 **Manage:** For intended users to process, modify and employ information in a collaborative manner. This includes document management, collaboration, web content management (e.g. via Website or Intranet), records management (including file plan, retention and archive management) and workflow / business process management;
- 5.3 **Deliver:** Timely provision of appropriate information to PIC users, clients and other external stakeholders. This should support the use of transformation technologies (e.g. XML, PDF, converters and viewers) and security technologies (including electronic signature, PKI and Watermarking). Distribution means must support various channels such as Internet, email, data transfer (e.g. EDI and XML), mobile devices, data media, digital TV, multimedia, printed paper, etc.;
- 5.4 **Preserve:** Long term care which stores and protects content so that it can be utilised in the future in line with PIC's retention strategy. Back up infrequently changing information in the medium and long term (L/T storage media and L/T preservation strategies (e.g. electronic archiving, storage networks); and
- 5.5 **Store:** Storage of information that is not required to be preserved for future organisational use. This should provide capabilities such as repositories (e.g. file systems, databases and data warehouse), library services (administration of content) and integration with various storage technologies such as online media (SAN, RAID, network attached storage), magnetic tape, compact disc, DVD and cloud storage.

- 5.6 The bidder should be able to provide or to interface with the PIC Store and Preserve platforms.
- 5.7 In line with the five (5) ECM components, PIC requires to have an ECM solution that systematically captures, manages, stores, preserves and delivers PIC content that is to be used by the designated audience – departments, teams, and individuals supporting key organizational processes through their entire and/or limited lifecycles.

6 SPECIFICATIONS FOR PIC ECM SCOPE OF WORK

6.1. Enterprise Content Management

PIC requires the following requirements to be enabled and supported using the chosen ECM platform (i.e. Microsoft SharePoint) with supplementary technologies (where applicable):

6.1.1 Capture and Imaging Processing

The ECM solution must be able to:

- Automate document identification, indexing, classification and filing;
- Support recognition engines (e.g. intelligent character recognition, optical character recognition and bar code);
- Provide image cleanup, repair and enhancement capabilities;
- Provide support for annotations;
- Support electronic (digital) signatures;
- Support distributed document capture;
- Support scanning/capture via from various devices (including multi-functional printers);
- Have an easy to use interface that is intuitive and compelling;
- Support the importing and exporting of images in formats such as XML, TIFF and PDF and fax;
- Enable forms capturing (including scanned and website forms) processing;
- Support aggregation of documents from different business applications;

6.1.2 Document Management

The system must be able to:

- Control documents from creation to archiving;
- Provide document check-in/check-out capabilities and document-level security;
- Provide version management for documents on all sites and sub-sites;
- Support the import of all types of documents including audios, videos and scanned images into the repository;
- Allow documents to be indexed according to the PIC taxonomy;
- Enable flexible search, navigation and organisation of documents;
- Automatically capture document metadata;
- Allow for capture of additional metadata;
- Support the generation of compound documents;
- Provide document rendition capabilities;
- Provide document linking capabilities (static, dynamic and/or other);
- Provide an offline capability;
- External secured access;
- Provide document security functionality;
- Provide added rights management capabilities to protect the content once checked out of the repository;
- Integrate with standard taxonomy tools and approaches (taxonomy need to be adaptive to changing organisational structures);
- Support distributed repository architecture;
- Support replication of content across data recovery (DR) servers;

6.1.3 Collaboration and Social Content Management

The System must be able to:

- Allow users to collaborate (i.e. simultaneously develop and process) on structured and non-structured content;

- Support threaded discussions around documents/content;
- Provide social media engagement, wikis, blogs and RSS feed capabilities;
- Support external users/collaboration beyond the firewall;
- Support the ability to synchronize content across multiple sources and devices (mobile devices such as smart phones and tablets);
- Support the ability to share applications and create common projects;
- Integrate with project management tools;
- Publication of PIC links;
- Allow for real-time collaboration by integrating with or supporting presence awareness, instant messaging, chat or Web conferencing;
- Allow for the creation of online communities

6.1.4 Records Management

The System must be able to:

- Enable administration of records (e.g., documents, mail, emails, etc.), important information and data in line with PIC records management guidelines (including the file plan and archival management);
- Support rule/policy-based or workflow-based records declaration;
- Support semi-automatic and/or automatic classification of records;
- Support the physical management of records;
- Support bar code and label printing;
- Provide for central records register (CRR) listing all PIC records and their associated metadata:
 - CRR must have capability to arrange the records by items like business owner, business process, department etc.;
 - CRR must allow for authorized users to change and maintain the register;
 - The CRR must have a basic approval workflow that can trigger notifications and alerts to other interested parties whenever there is a change in the CRR;

- The CRR must have consistent naming standards for all records and their associated metadata and should not allow duplicate record names unless there is a valid business reason to do so which will be approved by business owners and Records Manager;
- The CRR must have the capability to show retention schedules associated with each and every record on the register;
- The records register must also enforce that each and every record has a business owner associated with it and that the owners are part of the approval process for any changes on the record;
- There must be a front-end that can be used by any department to see relevant records registers with all the metadata and retention schedules associated with each and every record;
- There must be different levels of access to the CRR i.e. viewing, editing and deleting of records on the registry and for the approval process as well as acceptance of the disposal certificate;
- The front-end must also provide an interface whereby a user that is part of the approval process can log into and approve or reject a work item (as per point 2 above);
- The system must allow for an automated process to notify business of all records that are about to or have reached the end of their retention period and are ready for disposal;
- The system must be able to produce reports of what has been destroyed with minimum metadata for audit purposes;
- Provide the creation of a file plan including retention schedule administration;
- Support retention holds for records;
- Provide records review cycles and alerts;
- Provide records disposal capability

6.1.5 Business Process Management and Workflow

The System must be able to:

- Provide a business process management tool to create and manage workflows;
- Provide partnerships for business rules, process modelling analytics and reporting;
- Provide workflow (predefined and ad-hoc) capabilities to enable the control of information and data flow;
- Support capture, administration, visualization and delivery (including monitoring of process status) of grouped information with its associated documents and/or data;
- Enable the incorporation of data processing tools and documents (e.g. from Microsoft Office products);
- Provide reminders, deadlines, delegation and other administration functionality;
- Route “work” and/or content through the workflow via rule-based routing, sequential-routing or parallel-routing;
- Support routing through multi-level hierarchy for authorisations and that each level of authorisation can be modified on an exception basis;
- Support rule-based triggers that can be used within workflows;
- Route documents based on defined conditions or specify different actions to be taken before or after a deadline, or after a specified event occur;
- Send notifications as the document moves through approved workflows;
- Administer workflows across the organization, with import/export capabilities, workflow instance reporting, manual termination functionality, and user roles and security options;
- Create audit trails for all actions carried out within the workflow;
- Support work queues which are stateful, role based and can be load-balanced

6.1.6 Extended Components

The System must be able to:

- Support and/or integrate with multiple content repositories such as file systems, databases and data warehouses;
- Provide library services to enable administration (including access, search and retrieval) of content;
- Provide the capabilities for handling structured and unstructured content such as rich media (photographs, audio, video) in the repositories;
- Provide e-form functionality or integrate with third party e-form solutions;
- Support storage of content in a wide variety of technologies such as magnetic online media (e.g. hard drives, RAID, SAN and network-attached storage), magnetic tape, digital optical media and cloud computing;
- Support long-term, safe storage and backup of content; where applicable, integrate with content preservation technologies (electronic archiving);
- Enable controlled and traceable transformation of content through technologies such as XML, PDF, XPS (Microsoft), converters, compression and syndication;
- Provide or integrate (where applicable) with content security technologies such as electronic signature, PKI, digital rights management and watermarking;
- Support various output and distribution media including Internet/Website, Extranet, Intranet, email, fax, paper, mobile devices, data media (CDs, DVDs), and digital TV and multimedia services

6.2. WEBSITE, INTRANET AND EXTRANET REDESIGN

The bidder is required to develop and redesign the PIC intranet, extranet, and website as a communications channel, or as a repository for corporate content.

The **website** must create visibility of the PIC services, publishing news items, have a gateway or portal to other sites, offer public service or special interest, and have a virtual gallery or imagery.

The **intranet** must promote and assist the PIC to accomplish the following with ease:

- 6.2.1 Digitise and enhance corporate communication:
 - Publish important announcements
 - Advertise new initiatives and policies
 - Communicate company history, culture and positioning
 - Recognize outstanding employees
 - Gather feedback in the form of surveys and suggestions
- 6.2.2 Streamline processes
- 6.2.3 Spur collaboration
- 6.2.4 Promote knowledge management

Provide secure **extranet** (private network) designed specifically to allow PIC stakeholders (clients, vendors, suppliers, partners, etc.) to communicate with PIC employees in a closed virtual space. The extranet should allow for private communication, collaboration, knowledge sharing, document sharing, and data transfer between PIC and their stakeholders.

The Bidder must design and create the following functionality across all sites:

6.2.1. Functionality of the Site

a) Navigation & Framework

- Easy and clean navigation with information grouped and presented in a logical manner

- There will be a maximum of three levels of “drill down” navigation. This will ensure a user will be able to find content with a maximum of three clicks
- Users will be able to scroll up and down, but not be able to scroll left and right across the screen, therefore all content should fit into a standardized **1024x768** template
- Drop down menus must be included so that the visitor can easily find what they are looking for with a few clicks
- Links should be placed within the sites to allow individuals to contact institutions affiliated with the PIC (e.g. Useful Links). Links to downloadable resources (e.g. documents and templates) must be provided to appropriate audiences
- Size to be able to adjust to every screen i.e. mobile tablets, Macs, touches screens etc.
- Include visitor navigation history
- **Search:** Standard SharePoint 2013 and 2016 Search and Advance Search will be used
- **Search engine optimization** – Bidder to ensure optimization of both the intranet and internet (website) before hand-over to the PIC
- Keep consistency between the navigation structure and site “look and feel”
- The website should be interactive and have **a feedback feature**
- Link website analytics
- Include site map
- Graphic usage should support various formats
- Reduce the dimensions of picture information and use thumbnails for collections

b) Look and Feel

- The bidder is must share the trends in website design with great user experience (UX) and user interface (UI);
- There has to be a common thread in terms of the unfolding of the intranet and internet (website) concepts carried throughout the sites;
- The content should be intuitive, to the point and attractive to readers;
- The bidder to ensure that the PIC brand corporate identity is adhered to;

- Sites must clearly illustrate the PIC's corporate brand. Corporate signature to be placed on a static branding panel that appears through all the levels of the sites;
- The bidder to come up with a clean, creative, visually/graphically appealing design and layout of the home page and departmental pages;
- The service provider to come up with a creative, graphically appealing design and layout of the home page and sub-site pages, e.g. profile, products and services;
- Departmental pages should be creatively executed to depict the nature of business carried out by the respective departments;
- Have a photo gallery that allows for creation of folders;
- Use Arial as a font;
- Font sizes for headings, sub headings, etc. are specified on our in our Corporate Identity Manual, which will be shared with the service provider that will be working on the project.
- The service provider to use standard SharePoint functionality; and
- Typography has to be sleek.

7 TECHNICAL REQUIREMENTS

The proposed solution must be able to meet the following requirements:

- 7.1 SharePoint 2016 installation and configurations;
- 7.2 PIC Intranet, Website (farm design and configurations);
- 7.3 Electronic forms, out-of-the-box corporate communication apps and workflow);
- 7.4 Migration of the current PIC website from word press to native SharePoint 2016;
- 7.5 **Security:** The PIC requires a solution that will embed the prevention of security breaches such as spam, viruses, phishing, DOS attacks, site hijacking, unapproved posting and content, FTP access, personal information or database thefts. At least TLS (version 1.x) certificate with extended validation must be supported;

- 7.6 **Database integration** with the capability to create and manage one common database of users for integration;
- 7.7 **Mobile:** a solution that will render ECM capabilities appropriately on various mobile devices such as smartphones, androids and tablets of varying manufacturers. The Website, Extranet and Intranet must be responsively designed to accommodate mobile users;
- 7.8 **Web Accessibility International Standards:** the website must be built in accordance to the Web Content Accessibility Guidelines 1.0;
- 7.9 **Server/Hardware:** In the case where hardware is required the PIC will provide server/hardware, however the service provider must advise on minimum specifications on hardware depending on the option proposed;
- 7.10 **Web Browsers:** solution must be compatible with different web browser (Microsoft Internet Explorer 9 or higher, Microsoft Edge, Chrome, Safari 5.0 or higher, Mozilla Firefox, Mozilla, etc.);
- 7.11 **Performance:** the website must be able to handle multimedia (video) with high performance;
- 7.12 **Web Metrics:** must be able to have a wide range of web analytics functionality that can track and analyse how people use the website and produce meaningful reports;
- 7.13 **HTML Compliance:** Full compliance with HTML 5.0 or higher;
- 7.14 **Easy Maintenance:** The site (technical designs and configuration) must be well documented and easy to maintain by 1-2 person team;
- 7.15 The bidders proposal is expected to also cover the following:
 - Integration with sources of data (structured and unstructured) and information.
 - Migration of existing content, links and multimedia content from existing website.
- 7.16 **Reporting:** The solution provides built in reporting that integrate to data models and analysis services; supports custom report creation; and use SQL 2016 reporting services;
- 7.17 **Architecture and Platforms the ECM solution must make provision for:**

- Be implementable on premise, through cloud computing or in a hybrid content service
- Integrate with business applications natively, through connectors or add-on components;
- Support .NET apps development architectures/standards;
- Support Web services or service-oriented architecture (SOA);
- Support industry standards such as XACML, WebDAV or CMIS;
- Support multi-factor authentication and single sign on (e.g. Active Directory integration);
- Support customised and secure external membership authentication;
- Provide development tools, programming languages and APIs (REST, SOAP) that enable users to develop and customize their ECM applications;
- Provide integration with web portals preferably the latest SharePoint on the market;
- Integrate with Microsoft Office 2010 at a minimum and Office 365 Mail, instant messaging, whiteboards, online meetings, etc.;
- Integrate with Microsoft SharePoint 2010 at a minimum on-premises and with SharePoint Online;
- Support scripting languages and language translation (optional) excluding documents which must remain in English;
- Provide content business intelligence and analytics capabilities, natively or through integration with analytics engines;
- Integration with ARIS

8 PROGRAMME MANAGEMENT

The bidder must include the project management approach and plan for the deliverables to be implemented. The following deliverables are required in the bidder's response.

- Project Management plan with milestones and estimated timelines
- Project Deliverables: Project artefacts (Architecture, Functional, Technical, Testing Operations Manual, Training Material)

In addition the following services are required as part of the ECM adoption at the PIC:

8.1 Content Migration

- The bidder to migrate content from old to new sites. New content will also be introduced. The bidder will work closely with the Marketing and Communications Department and Records Management on content management from inventory check stage to go-live stage.
- Content should be kept simple and with a caring tone in line with the PIC values.

8.2 Performance Testing

- Performance and site testing to be done by the service provider and PIC team project members;
- Additional tests will be required by third party independent for further security and quality assurance.
- The service provider will be required to hand over technical documentation with full access to sites in case of editing;

8.3 Training and Hand-over

- Proper handover at every stage of delivery together with supporting documentation;
- The bidder will provide training to PIC staff and a training manual for all functions defined.
- For the project to be a success, functional training on SharePoint platform will be required as follows:
 - Administration Training
 - Super users (champions) Training
 - Technical Training (Support)
 - End user training
- Development sites i.e. production, test and development to be handed over;
- The signoff with regard to training will be required from both parties irrespective of when the project was handed over

8.4 CHANGE MANAGEMENT

- 8.4.1 With the initial implementation of the SharePoint project in the PIC, the adoption of the solution proved to be a challenge as change management and BPM was not factored in scope. By definition, change management is the process of transitioning people from old ways of doing things to a new way of doing things. It involves managing the human side of the change process to ensure that a particular business outcome is achieved.
- 8.4.2 The successful outcomes of the PIC ECM programme is intended to drive and support end-user behavior to ensure smooth transitioning of IT platforms in the business.
- 8.4.3 The bidder must describe the change management approach and plan to drive the adoption and use of the new solutions that will be deployed for use by the PIC community (individuals and teams).

9 CLIENT REFERENCES

Bidders must provide a list of contactable clients references of companies where similar work have been successfully delivered within the last 5 (five) years. Bidders 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. References details must include the following:

- 9.1 The name of the entity, contact person, designation of contact, contact number, contract value and date; and
- 9.2 Reference letter from client confirming the ECM, Intranet, Website and/or Extranet services provided.

10 SERVICE MANAGEMENT

The bidder will be required to enter into a Service Level Agreement with PIC for the scope of work detailed in this RFP, for a period of 5 years stipulating but not limited to the following:

- 10.1. Relationship Management Model and Activities;
- 10.2. Service Levels: Service Priority Levels and associated Turnaround times;
- 10.3. Service credit methodology in case of a Service Level Breach; and
- 10.4. Sample Service Level Reporting;
- 10.5. Maintenance and support should consist of the following:

10.5.1. Pro-active maintenance and development requests

Pro-active maintenance consists of general housekeeping on the SharePoint application to ensure that the system is running and performing optimally with minimum interruption. This typically includes monitoring of the health logs, performance counters, and error logs, and treatment of any issues identified in the process.

The 180 hours per month will be required for support and maintenance, including the following:

- Changes to existing functionality to any of the sites as requested by the PIC when required.
- Development of new functionality to any of the sites as requested by the PIC when required.
- Pro-active monitoring (health checks) of all sites.

10.5.2. Corrective Maintenance

Corrective maintenance refers to the service covering the analysis and resolution errors, and implementing the necessary changes to production. This particular service will apply in a “break-fix” manner, and included root cause analysis and bug fixes.

11 PROPOSED RESPONSES FORMAT

For the purpose of ease in evaluating the **Functionality of bids**, Bidders are required to present their bid documentation under the following headings:

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 3	Administrative requirements and completed RFP document	Completion of RFP document and submission of Administration requirements.
Section 4	Understanding of the PIC Requirements	Outline your understanding of the PIC Request for Proposal
Section 5	Scope of Work	Respond and cover all items presented for ECM.
Section 6	Project and Change Management Services	Respond and cover on how the project will be approached and planned.
Section 7	Technical Requirements	Respond and cover how the technical aspect of the solution will be provisioned
Section 8	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 9	Client References	Provide a summary of client references
Section 10	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

12 EVALUATION CRITERIA AND METHODOLOGY

The evaluation criteria will be based on the following requirements:

- Administrative requirements
- Mandatory Technical Requirements (Comply or Not Comply) – Bidders who do not meet the mandatory requirements will be disqualified.
- Technical Functional Requirement (100 points). Bidders, who score below 80 points, will not go through to the next level of evaluations. Presentations and site visits will form part of the technical evaluation. (Bidders 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).
- Price and BEE Evaluations (80/20 points).

13 MINIMUM ADMINISTRATIVE REQUIREMENTS

- Bidders valid pin number to verify Tax Status on SARS website;
- Completion of **Annexure I** by All bidders;
- Latest audited financial statements;
- BBBEE status level certificate –Accredited by SANAS verification agencies.

- EME's with an annual total revenue of R10 million or less are required to obtain a sworn affidavit or certificate issued by companies intellectual Property Commission (CIPC).
- Signed declaration of interest document.
- Completed and signed Company Information document and submission of all the required documentation as stipulated in the company profile document.
- CVs of the team that will be utilised to provide the service to PIC.
- 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 number.
- Acceptance of the conditions as stipulated in the bid document by initialing all pages of RFP Document;
- Submission of 1 original and five (3) copies of the proposal document and a separate envelope for pricing proposal;
- Submission of the soft copy of the proposal in a USB (labelled with the bidder's name); and
- All documents must be indexed, simple and clearly marked;

14 MANDATORY TECHNICAL REQUIREMENTS

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

Note: The following specific requirements must be met by the bidders and it will be expected of bidders to supply proof or confirm their commitment where applicable.

NOTE: FAILURE TO COMPLY WITH ALL OF THE MANDATORY REQUIREMENTS WILL LEAD TO DISQUALIFICATION.

14.1 Mandatory – PIC ECM Scope	Comply	Not Comply
<p>The bidder has rendered at a minimum of Five years' experience spanning across at least five (5) South African companies; one (1) of the five (5) companies must be in the Public Sector. The experience should entail ECM implementation as well as support services for:</p> <ul style="list-style-type: none"> • Enterprise Content Management; • Website; • Intranet and Extranet <p>The bidder must provide page/ paragraph references in the proposal for evidence of ECM Scope. In the event that the bidder does not provide ECM scope evidence, the bidder will be disqualified.</p>		
Substantiate / Comments:		
14.2 Mandatory – Local Presence	Comply	Not Comply

<p>The bidder must offer local support for ECM products and services.</p> <p>The bidder must provide page/ paragraph references in the proposal for evidence of local ECM support. In the event that the bidder does not provide local presence evidence, the bidder will be disqualified.</p>		
<p>Substantiate / Comments:</p>		

14.3 Mandatory – Proposed Solution Ownership / Accreditation	Comply	Not Comply
<p>The bidder must be an accredited / authorized installer or registered owner of the proposed solution.</p> <p>The bidder must provide certificate of ownership or Original Enterprise Manufacturer (OEM) accreditation pertaining to the proposed solution.</p>		
<p>Substantiate / Comments:</p>		

NOTE: Failure to comply with all the mandatory requirements shall lead to disqualification.

15 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:

Technical / Functional Criteria	Weightings
<p>15.1 Programme Management</p> <p>Elements: Submission by bidder must include an adequate and clear plan on programme management (including assessment, migration and implementation) of the ECM solution 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) • PIC ECM Assessment with redesign recommendations • PIC ECM Roadmap • Implementation Plan (including migration) • Post Implementation - stabilisation, service delivery, support and maintenance <p>Scoring Matrix – the elements listed above will be validated from the related sections in the Bidder’s proposal and will be evaluated in terms of the level below:</p>	<p>15</p>

- **0 = Poor:** No Programme Management Plan elements submitted or no level of understanding of the Programme Management
- **1 = Partially meet requirements:** Limited coverage and reasonable level of understanding of Programme Management elements
- **2 = Meet Requirements:** All Programme Management Plan elements submitted with an illustration of extensive level of understanding for Programme Management elements
- **3 = Meet and Exceed Requirements:** All Programme Management elements submitted with an illustration of exceptional understanding of Programme Management Elements; with value-add elements incorporated.

Each of the identified Programme Management elements will be scored in line with the above matrix; the total score will be calculated by adding all scores to reflect the overall Section 13.1 score on the following basis

Sum of Programme Management Elements' Scores	Total Overall Score
0 or ≤ 3	1
≥ 4 - ≤ 9	5
≥ 10 - ≤ 15	10.5
=15	15

Technical / Functional Criteria	Weightings																															
<p data-bbox="261 478 1179 558">15.2 Programme Manager / Technical Lead – Years of experience in ECM and Website related programmes</p> <p data-bbox="261 621 1179 793">The Programme Manager / Technical Lead must have a minimum of five (5) years (e.g. from 2012 to 2017) programme management or technical lead experience on ECM programmes implementing the proposed solution as per scoring matrix below. If less than 5 years 'experience, no score will be awarded.</p> <p data-bbox="261 856 1179 1073">Please provide a copy of the C.V. of the Programme Manager / Technical Lead who will be responsible for the PIC ECM 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> <table border="1" data-bbox="261 1094 1179 1381"> <thead> <tr> <th data-bbox="266 1094 370 1283">Client</th> <th data-bbox="370 1094 505 1283">Programme Implemented</th> <th data-bbox="505 1094 639 1283">Budget</th> <th data-bbox="639 1094 774 1283">Start Date</th> <th data-bbox="774 1094 909 1283">End Date</th> <th data-bbox="909 1094 1044 1283">Relevance to ECM</th> <th data-bbox="1044 1094 1179 1283">Client Contact Details</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table border="1" data-bbox="261 1430 1179 1675"> <thead> <tr> <th colspan="2" data-bbox="266 1430 1179 1465">Scoring Matrix: Experience of Programme Manager / Technical Lead</th> </tr> <tr> <th data-bbox="266 1476 849 1528">Years of Experience</th> <th data-bbox="849 1476 1179 1528">Score</th> </tr> </thead> <tbody> <tr> <td data-bbox="266 1528 849 1581">< 5 years</td> <td data-bbox="849 1528 1179 1581">1</td> </tr> <tr> <td data-bbox="266 1581 849 1633">≥ 5 - < 8 years</td> <td data-bbox="849 1581 1179 1633">7</td> </tr> <tr> <td data-bbox="266 1633 849 1686">≥ 8 years</td> <td data-bbox="849 1633 1179 1686">10</td> </tr> </tbody> </table>	Client	Programme Implemented	Budget	Start Date	End Date	Relevance to ECM	Client Contact Details															Scoring Matrix: Experience of Programme Manager / Technical Lead		Years of Experience	Score	< 5 years	1	≥ 5 - < 8 years	7	≥ 8 years	10	<p data-bbox="1263 422 1300 447" style="text-align: center;">10</p>
Client	Programme Implemented	Budget	Start Date	End Date	Relevance to ECM	Client Contact Details																										
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Years of Experience	Score																															
< 5 years	1																															
≥ 5 - < 8 years	7																															
≥ 8 years	10																															

<p>Programme Team Members:</p> <p>At least 70% of the proposed programme team members must each have more than three (3) years' experience of implementing the proposed solution, intranet or website. This team split must be maintained throughout the lifecycle of the PIC ECM programme.</p> <p>The bidder must provide a list for programme resources / roles (including experience years of each) that will be assigned to PIC. This will be used to calculate the 70:30 ratio.</p>									
<p>Scoring Matrix: Experience of Programme Resources or Roles</p> <table border="1"> <thead> <tr> <th>Average of Total Number of Years</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>< 3 years</td> <td>1</td> </tr> <tr> <td>≥ 3 < 5 years</td> <td>7</td> </tr> <tr> <td>≥ 5 years</td> <td>10</td> </tr> </tbody> </table>		Average of Total Number of Years	Score	< 3 years	1	≥ 3 < 5 years	7	≥ 5 years	10
Average of Total Number of Years	Score								
< 3 years	1								
≥ 3 < 5 years	7								
≥ 5 years	10								

Technical / Functional Criteria	Weightings
<p>15.3 Company Experience (References)</p> <p>Please provide a minimum of three (3) recent (not older than 6 months) attestation letters from the respective customers on the letterheads confirming implementation of the required ECM Products and Services.</p> <p>The letters must include the company name, the services offered, duration, contact person and contact numbers (If the letters do not include all of the above requirements, the PIC will not accept the letter as being valid.)</p>	10

Technical / Functional Criteria	Weightings										
<p>Please note: The PIC will not accept a list of references and/or references listed on a table. The reference letters must be in the form of individual letters from the respective customers.</p> <table border="1" data-bbox="261 600 1159 846"> <thead> <tr> <th colspan="2" data-bbox="261 600 1159 646">Track record (References) : Scoring Matrix</th> </tr> <tr> <th data-bbox="261 646 846 699">Reference letters with all requirements</th> <th data-bbox="846 646 1159 699">Score</th> </tr> </thead> <tbody> <tr> <td data-bbox="261 699 846 747">0 - < 3 reference letters</td> <td data-bbox="846 699 1159 747">1</td> </tr> <tr> <td data-bbox="261 747 846 795">3 reference letters</td> <td data-bbox="846 747 1159 795">7</td> </tr> <tr> <td data-bbox="261 795 846 846">4 or more reference letters</td> <td data-bbox="846 795 1159 846">10</td> </tr> </tbody> </table>	Track record (References) : Scoring Matrix		Reference letters with all requirements	Score	0 - < 3 reference letters	1	3 reference letters	7	4 or more reference letters	10	
Track record (References) : Scoring Matrix											
Reference letters with all requirements	Score										
0 - < 3 reference letters	1										
3 reference letters	7										
4 or more reference letters	10										

Technical / Functional Criteria	Weightings										
<p>15.4 Compliance to the PIC ECM scope Bidders must illustrate current capability and capacity to meet PIC ECM requirements. Bidders must fully complete ANNEXURE A and cross reference their responses and compliance to scope as outlined in section 6.1 of this document.</p> <p>Each of the identified ECM Scope elements will be scored a (1) if the PIC requirement is met. The total score will be calculated by adding all scores to reflect the overall Section 15.4 score on the following basis:</p> <table border="1" data-bbox="261 972 1159 1270"> <thead> <tr> <th>Sum of ECM Scope Elements' Scores</th> <th>Total Overall Score</th> </tr> </thead> <tbody> <tr> <td>0 or ≤ 4</td> <td>5</td> </tr> <tr> <td>≥ 5 - ≤ 21</td> <td>10</td> </tr> <tr> <td>≥ 21 - ≤ 33</td> <td>21</td> </tr> <tr> <td>=34</td> <td>30</td> </tr> </tbody> </table>	Sum of ECM Scope Elements' Scores	Total Overall Score	0 or ≤ 4	5	≥ 5 - ≤ 21	10	≥ 21 - ≤ 33	21	=34	30	<p style="text-align: center;">30</p>
Sum of ECM Scope Elements' Scores	Total Overall Score										
0 or ≤ 4	5										
≥ 5 - ≤ 21	10										
≥ 21 - ≤ 33	21										
=34	30										
Technical / Functional Criteria	Weightings										
<p>15.5 PIC Website, Intranet, and Extranet Compliance to the PIC Website, Intranet or Extranet scope Bidders must illustrate current capability and capacity to meet PIC requirements (refer to ANNEXURE A); plus bidders must cross reference their responses and compliance to scope as outlined in the document section 6.2.</p> <p>Each of the identified Website, Intranet or Extranet Scope elements will be scored a (1) if the PIC requirement is met. The total score will be calculated by adding all scores to reflect the overall Section 15.5 score on the following basis:</p>	<p style="text-align: center;">20</p>										

The Bidder must provide a portfolio of evidence of their work in previous projects for 2 Websites; 2 Intranet sites & 1 Extranet site designed for public and/or private sector institutions.

The bidder will also be evaluated on the intranet, extranet and website look and feel (refer to related PIC requirements' section) to verify the requirements.

The Website, Intranet or Extranet look and feel to must be of good quality and must include, but not be limited to:

- Relevance of proposal to PIC's brand and website needs
- Crucial business information
- Contact information
- Clear navigation
- Security
- Social media integration
- Mobile ready version
- Frequently Asked Questions (FAQ)
- Good hosting

Sum of ECM Scope Elements' Scores	Total Overall Score
0 or ≤ 4	5
≥ 5 - ≤ 14	10
≥ 14 - ≤ 19	14
=20	20

<p>15.6 Technical Requirements</p> <p>Compliance to the technical scope (10 Points)</p> <p>Bidders must illustrate current capability and capacity to meet PIC’s technical requirements (refer to ANNEXURE A).state need for full completion; plus bidders must cross reference their responses and compliance to scope as outlined in section 10 of the document.</p> <p>Each of the identified Technical Scope elements will be scored a (1) if the PIC requirement is met. The total score will be calculated by adding all scores to reflect the overall Section 10 score on the following basis:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Sum of Technical Scope Elements’ Scores</th> <th style="width: 50%;">Total Overall Score</th> </tr> </thead> <tbody> <tr> <td>0 - < 3</td> <td style="text-align: center;">1</td> </tr> <tr> <td>≥ 3 - ≤ 6</td> <td style="text-align: center;">3</td> </tr> <tr> <td>≥ 10.5- ≤ 11</td> <td style="text-align: center;">7</td> </tr> <tr> <td>= 15</td> <td style="text-align: center;">10</td> </tr> </tbody> </table>	Sum of Technical Scope Elements’ Scores	Total Overall Score	0 - < 3	1	≥ 3 - ≤ 6	3	≥ 10.5- ≤ 11	7	= 15	10	<p>10</p>
Sum of Technical Scope Elements’ Scores	Total Overall Score										
0 - < 3	1										
≥ 3 - ≤ 6	3										
≥ 10.5- ≤ 11	7										
= 15	10										

Technical / Functional Criteria	Weightings																				
<p>15.7 Service Level Agreement</p> <p>Bidders must:</p> <ul style="list-style-type: none"> • Propose SLAs (including availability, criticality, support type, priority and response levels) for the PIC for each of the ECM services. • Provide historical evidence of consistent service delivery for a period of 3 years (SLA reports) covering the SLA points stipulated above. <table border="1" data-bbox="295 791 1196 1192"> <thead> <tr> <th colspan="5" data-bbox="295 791 1196 837">Scoring Matrix</th> </tr> <tr> <th data-bbox="295 837 727 995">Requirement</th> <th data-bbox="727 837 818 995">Yes</th> <th data-bbox="818 837 898 995">No</th> <th data-bbox="898 837 1097 995">Section reference in the proposal</th> <th data-bbox="1097 837 1196 995">Score</th> </tr> </thead> <tbody> <tr> <td data-bbox="295 995 727 1045">• Proposed SLA</td> <td data-bbox="727 995 818 1045"></td> <td data-bbox="818 995 898 1045"></td> <td data-bbox="898 995 1097 1045"></td> <td data-bbox="1097 995 1196 1045">2.5</td> </tr> <tr> <td data-bbox="295 1045 727 1192">• Evidence of consistent service delivery for a period of 3 years</td> <td data-bbox="727 1045 818 1192"></td> <td data-bbox="818 1045 898 1192"></td> <td data-bbox="898 1045 1097 1192"></td> <td data-bbox="1097 1045 1196 1192">2.5</td> </tr> </tbody> </table> <p>Scoring matrix – If yes is ticked (referred to the specific section in the proposal), maximum points per requirement will be awarded. If no, 0 points will be awarded.</p>	Scoring Matrix					Requirement	Yes	No	Section reference in the proposal	Score	• Proposed SLA				2.5	• Evidence of consistent service delivery for a period of 3 years				2.5	<p style="text-align: center;">5</p>
Scoring Matrix																					
Requirement	Yes	No	Section reference in the proposal	Score																	
• Proposed SLA				2.5																	
• Evidence of consistent service delivery for a period of 3 years				2.5																	

16 PRICING PROPOSAL

Bidders 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 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 Bidders must take note of the following:

- All pricing (including services, resources, hourly rates charged etc.) to be quoted in South African Rand including VAT. Pricing should be in alignment with the National Treasury.
- Disbursements will be discussed and agreed during contract negotiations in line with the PFMA and/or National Treasury Regulations.

Pricing should follow this format considering the outlined deliverables specified in the tender document.

PIC ECM Component & Management	Once-Off Costs (e.g. Transitioning and Implementation services)	Monthly Maintenance & Support (per year)	Monthly Fee (cloud hosting only)	Sub-Totals	Explain Basis for Monthly Fee / Comments
Intranet					
Website					
Extranet					
ECM Solution					
TOTALS:					N/A

- (a) Annual increases must not exceed CPI related to the specific year;
- (b) A maximum of 80 points is allocated for price on the following basis:

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

P = Points scored for price of bid under consideration

P_t = Rand value of bid under consideration

P_{min} = Rand value of lowest acceptable bid

Broad Based Black Economic Empowerment Status Level Certificates

Bidders with annual total revenue of R10 million or less qualify as Exempted Micro Enterprises (EMEs) in terms of the Broad Based Black Economic Empowerment Act, and must submit a certificate issued by a registered auditor, accounting officer (as contemplated in section (60 (4) of the Close Corporation Act, 1984 or an accredited verification agency.

Bidders other than the Exempted Micro-Enterprises (EMEs) must submit their original and valid BBBEE status level verification certificate or a certified copy thereof issued by a SANAS accredited agency, substantiating their BBBEE rating.

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
1	20
2	18
3	14

4	12
5	8
6	6
7	4
8	2
Non-compliant Contributor	0

15.5.4 A point out of 100 (50/ownership and 50/executive management) will be allocated for ownership and executive management: based on the following:

Percentage	Points allocated
0-49	0
50-60	10
61-70	20
71-80	30
81-90	40
90-100	50

15.6 Ownership

15.6.1 Indicate percentage of Black ownership

_____ %

15.6.2 Indicate a percentage of black executive management

_____ %

15.6.3 List of Shareholders

Name	ID No	SA Citizen	Race	Gender	Shareholding %

Points scored in terms of the 80/20 preference system will be added to the points scored for % black ownership and % of black Executive Management.

Points scored will be rounded off to the nearest two decimal places.

The Bidder who scored the highest point will be awarded the bid.

In the event where two or more bidders scored equal points, the successful bidder must be the one scoring the highest preference points for BBBEE.

However, when functionality is part of the evaluation process and two or more bidders have scored equal points including equal preference points for BBBEE, the successful bidder must be the one scoring the highest for functionality.

Should two or more bidders be equal in all respects, the award shall be decided by the drawing of lots.

17 CONDITIONS

17.1 Joint Ventures / Consortiums

(Preference will be given to bidders who forms or already has existing Joint Venture/Consortium agreements in place.)

The following information and documentation must be submitted:

- All information stipulated in paragraph 12 under minimum and administrative requirements must be submitted by all parties involved in the Joint Ventures/Consortiums, including ownership and executive management information.
- A BEE certificate for the JV/Consortium

- A percentage breakdown of the work allocation between the parties must be clearly indicated.
- A formal signed agreement indicating the leading company as well as the other company roles and responsibilities must be submitted.

17.2 Non-Commitment

17.2.1 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.

17.2.2 The cost of preparing of bids will not be reimbursed.

17.3 Reasons for rejection

17.3.1 The PIC reserves the right to reject bids that are not according to specification/Terms of Reference. Bidders must clearly indicate compliance or non-compliance with specification/Terms of Reference.

17.3.2 Bidders 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.

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

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

- have abused the Supply Chain Management (SCM) system of any Government Department/ institution;
- have committed proven fraud or any other improper conduct in relation to such system;

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

17.4 Cancellation of Bid

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

- due to changed circumstances, there is no longer a need for the goods or services requested;
- funds are no longer available to cover the total envisaged expenditure;
- no acceptable bids are received.

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

- due to change of circumstances, there is no longer a need for the goods or services requested;
- funds are no longer available to cover the total envisaged expenditure.

17.5 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 .

17.6 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 bidders shall not be returned and shall remain the property of the PIC.

17.7 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. Bidders 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.

17.8 Presentations

The PIC will require presentations at a stipulated date and time from short-listed bidders as part of the bid process.

17.9 Service Level Agreement (SLA)

17.9.1 The SLA will set out the administration processes, service levels and timelines.

17.9.2 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.

17.10 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.

18 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 / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

.....

.....

.....

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

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	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

19 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'))

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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>(i.e. verification to be completed within a maximum of 2 months)</i></p>	
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20 DECLARATION

Bidder Name: _____

Signature: _____

Designation: _____

I declare that:

- All information provided is true and correct
- The signatory of the bid document is duly authorised
- 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:

ANNEXURE I

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (PUBLIC INVESTMENT CORPORATION)					
BID NUMBER:	PIC 008/2017	CLOSING DATE:	18 Oct 2017	CLOSING TIME:	11:00 AM
DESCRIPTION	QUALIFIED BIDDER FOR THE PROVISION OF ENTER PRIZE CONTENT MANAGEMENT, WEBSITW AND INTRANET REDESIGN SERVICE SERVICES FOR A PERIOD OF FIVE (5) YEARS				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)

Menlyn Maine Central Square					
Corner Aramist Avenue and Corobay Avenue					
Waterkloof Glen Extension 2					
0181					
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELL PHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
		TCS PIN:		OR	CSD No:
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE		<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL	
				<input type="checkbox"/> Yes	

[TICK APPLICABLE BOX]	<input type="checkbox"/> No	SWORN AFFIDAVIT	<input type="checkbox"/> No
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?			
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)	
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)	
	<input type="checkbox"/>	A REGISTERED AUDITOR	
		NAME:	
[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]			
21 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]	22 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 BELOW]
23 SIGNATURE OF BIDDER	24 DATE	
25 CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			

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 ONLINE

2.1

1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.

2.2

1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.

1.5. 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 LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.

2. TAX COMPLIANCE REQUIREMENTS

2.3 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.4 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.

2.5 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.

2.6 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.

2.7 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.

2.8 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?

YES NO

3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA?

YES NO

3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

YES NO

3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?

YES NO

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

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.