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BID DESCRIPTION	IMPLEMENTATION OF WHATSAPP BUSINESS SOLUTION
BID NUMBER	OPFA/ICT/032026
CLOSING DATE	29 SEPTEMBER 2026
CLOSING TIME	11H00

BIDDER	
COMPANY REGISTRATION NUMBER	
CSD NUMBER	MAAA

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1. INTRODUCTION

- 1.1. The Office of the Pension Funds Adjudicator (OPFA) was established in terms of section 30B of the Pension Funds Act No.24 of 1956 (“Act”) with effect from 1 January 1998 to investigate and determine complaints lodged in terms of the Act.
- 1.2. The OPFA is funded in terms of section 30R of the Act. In terms of section 30D of the Act, the main objective of the Adjudicator is to dispose of complaints lodged in terms of section 30A (3) and complaints for which the Adjudicator is designated in terms of section 211 of the Financial Sector Regulation Act No.9 of 2017.
- 1.3. The mandate of the OPFA is to ensure a procedurally fair, economical, and expeditious resolution of complaints in terms of the Act, by:
 - 1.3.1. Ensuring that its services are accessible to all
 - 1.3.2. Investigating complaints in a procedurally fair manner
 - 1.3.3. Reaching a just and expeditious resolution of complaints in accordance with the Act.
- 1.4. In supporting the mission of the OPFA, Information and Communication Technology (ICT) has been identified as one of the key drivers in modernising and continuously improving the functioning of the organisation.
- 1.5. This modernisation is aimed at improving service delivery to the stakeholders of the office and optimising internal operations. To this end, various investments have been made in underlying technologies to support the mission on the organisation and to ensure business continuity.

2. BACKGROUND AND CONTEXT

- 2.1. The OPFA uses the Respond case management system, developed on Microsoft .NET technology and supported by SQL Server 2019, to capture, process, manage and monitor complaints received from members of the public. The system is central to the OPFA's service delivery environment, as it supports the effective administration of complaints, case tracking, and communication with complainants.
- 2.2. Complaints are received through multiple service channels, including the OPFA website, email, walk-in enquiries and postal correspondence. These complaints are recorded in Respond to ensure that they are managed and tracked through a centralised process. Complaints submitted through the OPFA website are automatically created in Respond upon online submission, while complaints received through other channels are captured manually by the relevant OPFA officials.
- 2.3. Once a complaint has been captured, complainants can monitor the progress of their matters through the online tracking tool available on the OPFA website. Additional support is provided through direct email communication and in-person enquiries at the OPFA offices. Respond also sends SMS notifications to complainants as the case progresses through the complaints resolution process.
- 2.4. The OPFA maintains a digital presence on platforms such as Facebook, LinkedIn and X to share information and engage with its stakeholders. The OPFA also has a WhatsApp channel that is also used to communicate with its stakeholders. This channel is used to share posts such as pension fund related information, videos, and other stakeholder communication material.

3. PURPOSE AND OBJECTIVE OF THE BID/PROJECT

- 3.1. The purpose of this Bid is to invite suitably qualified and experienced bidders to submit proposals for the design, development, implementation, maintenance and support of a WhatsApp Business solution for the OPFA.
- 3.2. This Project aims to strengthen service accessibility, responsiveness and stakeholder engagement, the OPFA intends to implement a modern, secure, trusted and user-friendly WhatsApp Business solution.
- 3.3. The proposed platform will provide an additional digital service channel through which stakeholders can conveniently access self-service functions such as complaint tracking,

case status enquiries, frequently asked questions and other OPFA-related business services.

- 3.4. The introduction of this channel is expected to enhance the customer experience on a platform widely used in South Africa, broaden access to OPFA services.

4. SCOPE OF SERVICES REQUIRED

The scope of the required services will include the following:

- 4.1. Design, develop and implement WhatsApp Business solution in line with the **Business Requirements** set out in **Section 6 below**.
- 4.2. Provide and configure the WhatsApp Business Platform Cloud API.
- 4.3. Manage the process for Meta Business verification for the OPFA.
- 4.4. Provide maintenance and support services for the solution across all ICT environments for a period **of eighteen (18) months**.
- 4.5. Analyse the business requirements in consultation with the OPFA.
- 4.6. Deliver the completed solution within six (6) months from the date of appointment.
- 4.7. The solution may be implemented in two phases, subject to the minimum viable product functionality agreed with the OPFA for each phase. Phase 1 must be delivered within three (3) months from the date of appointment.

4.8. Phase Deliverables

- 4.8.1. The successful bidder shall provide all deliverables required for the planning, design, implementation, testing, deployment, support, and closure of the WhatsApp Business solution project.
- 4.8.2. All deliverables shall be submitted in an agreed format and within the approved project timelines. No phase shall be regarded as complete unless the associated deliverables have been submitted, reviewed, and formally accepted by both the parties.

4.8.4. The table below sets out the phase deliverables expected from the bidder. The OPFA reserves the right to review, comment on, and formally accept each deliverable before the relevant phase is regarded as complete.

#	Phase	Summary Deliverables
4.8.3.1.	Project Initiation	Project Initiation Document, Project Plan Communication Plan, Change Management Plan, and Risk Register.
4.8.3.2.	Business Analysis and Requirements Validation	• Business Requirements and Technical Specification Document • Solution Architecture and Design documentation (including integration)
4.8.3.3.	WhatsApp Platform Enablement	OPFA WhatsApp Business Account and Cloud API Setup, Verification Support
4.8.3.4.	Solution Development and Integration	Configured WhatsApp Platform with the business requirements
4.8.3.5.	Testing and Quality Assurance	Test Plans, Test Results, Defect Logs, UAT Sign-Off.
4.8.3.6.	Training, Deployment and Go-Live	Training Material, User and Administrator Guides, Deployment Plan and Go-Live Sign-Off.
4.8.3.7.	Maintenance and Project Closure	• Post Go Live Support, • SLA Maintenance and Support, • Configuration of WhatsApp Business Solution in the DR Environment. • Monthly Reports, • Updated Solution Documentation, • Closure Report, and Final Handover.

5. MAINTENANCE & SUPPORT SERVICES

- 5.1. The following minimum service standards and service level agreement, targets and penalties will be applicable during the maintenance and support phase of the contract.

Description	Mean time to Respond	Mean time to Repair	Target	Penalties
Incidents – Normal	1 hour	8 hours	95%	3% of the monthly invoice
Incidents – Critical (Complete system failure)	1 hour	4 hours	95%	3% of the monthly invoice
Service requests	1 hour	8 hours	95%	3% of the monthly invoice
Service requests (New enhancements/business requirements)	1 hour	4 hours	95%	3% of the monthly invoice
Problem Management	n/a	40 hours	90%	3% of the monthly invoice
Problem Management (Root cause Analysis Report)	n/a	40 hours	100%	3% of the monthly invoice
Reports		As per agreed reporting dates	100%	5% of the monthly invoice

5.2. Maintenance & Support Requirements

- 5.2.1. **Incidents and Problem Resolution** - This includes resolving all break fixes to restore the IT system in line with Service Level Agreement (SLA). This also includes producing root cause analysis reports for major incidents and problems.
- 5.2.2. **Service Requests** – This includes attending to all requests from the users (e.g., making changes to existing WhatsApp self-help services.)
- 5.2.3. **Corrective, Adaptive, Perfective & Preventative Maintenance Services.** This must be implemented at least once a month during the maintenance weekend. This includes installing the necessary WhatsApp patches and integration testing with other applications during the maintenance weekend.

- 5.2.4. **System Availability and Performance Monitoring** – This includes end to end system availability and monitoring of the solution.
- 5.2.5. **System Upgrades** – This includes participation in the upgrade or update of the base Windows and database layers (Windows SQL etc.). This also includes at least one major system upgrade if released by the OEM during the contract. The upgrade and timelines must be agreed with the OPFA before implementation.
- 5.2.6. **Disaster Recovery and Tests** – This involves participating in the pre and actual disaster recovery tests including creating a step-by-step disaster recovery manual for starting up the solution in DR and production after the test or actual DR. The successful bidder will also be required to participate in setting up the backup of the system using the Veeam Backup solution and implementing the designed solution and ensure that the data between the two sites is synchronised at a minimum of 15 minutes interval. This also includes restoring services at the DR site in case of a major incident or a disaster.
- 5.2.7. **Backup Services** – This includes ensuring that the solution is fully backed up utilising the current OPFA Veeam backup solution. This also includes testing the backups in line with the OPFA backup policy (minimum of three times a year).
- 5.2.8. **Document Upkeep** – This includes ensuring that all the solution documentation is kept up to date for the duration of the contract including training material and recordings.
- 5.2.9. **User Access Management** – Ensure that the user access is maintained and kept up to date at all times. This includes creating, maintaining and disabling users based on approved service requests.
- 5.2.10. **Security Management** – Ensure that the system security is always kept up to date.
- 5.2.11. **Audit Management** – Participate in providing management information for internal and external audit findings in line with the auditors required timelines. This includes drafting management responses for the audit questions related to the system and the scope of the contract.
- 5.2.12. **Reporting** – Configuring all the required reports required for the optimal running of the OPFA business.

5.3. Maintenance & Support Services Payments/Invoicing

- 5.3.1. The maintenance and support invoice services must be submitted monthly after delivery of the services.
 - 5.3.1.1. The invoice must be preceded by the monthly report and performance against SLA agreements. This report will be reviewed by OPFA and discussed with the service provider.
 - 5.3.1.2. The penalties, if applicable, will be applied as per the penalty section above.

5.4. Continuous Improvement Services

- 5.4.1. This is a provision that will be used to implement new business requirements. These ad-hoc requests will be initiated by the OPFA.
- 5.4.2. Upon submission of the business change request by the OPFA, the bidder will prepare the statement of work for consideration and approval by the OPFA. Only after approval can the bidder implement the change.
- 5.4.3. Once the statement of work is approved, the service provider responsibilities will include the following:
 - 5.4.3.1. Analysing the requirements in consultation with the OPFA.
 - 5.4.3.2. Documenting the solution design (functional and technical).
 - 5.4.3.3. Completing a change request form.
 - 5.4.3.4. Developing, testing and implementing the enhancement.
 - 5.4.3.5. Developing testing and training material.
 - 5.4.3.6. Updating the documentation.
- 5.4.4. The service provider must make a provision of 100 hours for ad-hoc services. These services will be initiated by the OPFA based on new business requirements.
- 5.4.5. The service provider is not entitled to the total amount in this provision. The service provider can only bill for the actual work done and signed off by the OPFA.

6. BUSINESS REQUIREMENTS

- 6.1. The WhatsApp Business solution must meet the business, functional, technical, security, integration, reporting and support requirements set out in this section. The requirements are intended to ensure that the solution provides a user-friendly, secure, reliable and scalable digital service channel that enables complainants and other stakeholders to access OPFA services through WhatsApp.

6.1.1. Integration Requirements	
Category	Requirement
Internal Systems	The solution must integrate with the OPFA's Respond Case Management System to enable real-time query processing, retrieval of complaint information, and the provision of accurate case status updates to complainants through the WhatsApp platform. Note: The Respond web application provides a number of REST based web services that provide integration capabilities. The web services enable a third-party application to retrieve a case, create a case, update a case and run a search amongst other capabilities. The services are built using REST principles while returning and consuming XML.
	The solution must be integrated with SharePoint Online, Microsoft Active Directory (AD) for on-prem identity, with optional support for Microsoft Entra ID (Azure AD) integration where applicable and Microsoft 365 services where applicable.
Digital Channels	The solution must integrate with the OPFA website to direct users to the official OPFA WhatsApp Business Platform through clearly accessible links, buttons or other digital entry points.
	The solution should enable users engaging with the OPFA through digital platforms such as the OPFA WhatsApp channel, Facebook, LinkedIn, X and other relevant social media channels to be redirected easily to the OPFA WhatsApp Business platform.
	The solution must be scalable and be able to integrate into other digital platforms which the OPFA may introduce in future.

6.1.2. Complaint Management	
Category	Requirement
Customer Self-Service – Complaint Management	The solution must enable complainants to - Track the status of their complaints, - Receive progress updates on their complaints including issuing of the case reference number when the complaint is lodged, - Submit confirmation of settlement of the complaint with the fund or employer - Lodge a complaint via a URL link to the OPFA website.

6.1.3. Customer Information Management	
Category	Requirement
Customer Self-Service - Customer Information Management	The solution must enable complainants to - Update their contact information such as cellphone number and email address, - Verify identity prior to updates, - View profile details

6.1.4. Document Management	
Category	Requirement
Customer Self-Service - Document Management	The solution must enable complainants to - Upload supporting documents to their case, such as ID copies, payslips and other supporting complaint documents, and - Download documents such as the determination and other correspondence generated by the Office.
	The solution must ensure secure storage and transfer of uploaded files into the Respond Case Management System.

6.1.5. System Usability & Design	
Category	Requirement
Customer Self-Service – Usability & Design	The solution should provide - A simple, intuitive and user-friendly interaction model that supports structured conversation flows, rich menus and interactive messages - Automated responses, quick reply options and guided self-help menus - FAQ and keyword-based assistance - Chatbot and AI-powered question answering - Multilevel conversation menus to enable efficient stakeholder engagement. - Intent recognition and natural language processing - Escalation to human agents and agent transfer functionality
	The solution must be capable of Handling exceptions and error scenarios within the user journey, including but not limited to incorrect menu selections, incomplete inputs, invalid search criteria and failed lookups, while still providing clear guidance to users

6.1.6. Communications and Marketing Requirements

Category	Requirement
Customer Feedback	The solution must enable users to capture customer feedback, including compliments, suggestions and complaints, and provide authorised OPFA users with access to the submitted feedback.
Content Distribution	The solution must support the sharing of stakeholder communication content, including links to information, videos, documents, banners, campaigns and other approved OPFA communication material.
Communications Collaboration	The bidder must identify and recommend WhatsApp-based communications and marketing features that could benefit the OPFA.

6.1.7. System Notifications

Category	Requirement
Notifications	The solution must support various notifications to be sent to the complainant such as reference number notification, case status notifications, service notifications, reminder messages, broadcast messages, optional marketing communications, one-time-password messages and customer authentication messages.

6.1.8. Security Requirements

Category	Requirement
Access and Authentication	The solution must provide role-based access control, multi-factor authentication and secure API access.
Data Protection	The solution must provide end-to-end encryption support, data masking, secure data storage and secure handling of stakeholder information.
Monitoring and Incident Management	The solution must provide audit trail logging, session management, vulnerability management, security monitoring and incident response procedures.
Business Continuity	The solution must provide disaster recovery capability, backup and restoration procedures.

6.1.9. Compliance Requirements

Category	Requirement
Legal and Regulatory Compliance	The solution must comply with POPIA, the Electronic Communications and Transactions Act and applicable cybersecurity best practices.
Platform Policy Compliance	The solution must comply with WhatsApp Business Platform policies and Meta business policies.

6.1.10. Customer Content Requirements

Category	Requirement
Consent Capture	The solution must capture opt-in consent and comply with applicable privacy legislation.
Consent Records	The solution must store consent records, maintain communication preferences and maintain consent audit history.
Opt-out Management	The solution must support opt-out functionality for users.

6.1.11. Reporting and Analytics	
Category	Requirement
Operational Reporting	The solution must provide dashboard reporting, usage statistics, volume reporting and service performance reporting.
Customer and Agent Insights	The solution must provide customer satisfaction reporting, agent performance reporting and chatbot analytics.
Audit and Export	The solution must provide message delivery reporting, audit reports and exportable reports in PDF and Excel formats.

6.1.12. Performance Requirements	
Category	Requirement
Capacity and Scalability	The system must support high transaction volumes, concurrency and scalability.
Availability and Responsiveness	The system must deliver responses within acceptable timeframes (3 seconds) and achieve high availability.
Resilience	The system must provide load balancing capability and support business continuity requirements.

7. BID EVALUATION

7.1. The proposal will be evaluated in four stages

7.1.1. Stage 1- Administrative and Compliance

7.1.2. Stage 2- Functionality Evaluation

7.1.3. Stage 3- Price and Preference Points system

7.2. Evaluation Stage One: Administrative and Compliance

7.2.1. Compliance with administrative and mandatory requirements stated in the standard bidding documents. Bidders that fail to provide the required information and documentation will be disqualified from further evaluation.

Documents that must be submitted	Non-Submission may result in disqualification	
Master Bid Document	Yes	Provided and bound
Electronic copy (USB /compact disc)	Yes	Same as the master bid document
Invitation to Bid - SBD 1	Yes	Duly completed and signed
CSD Registration	Yes	CSD registration number. If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Register https://secure.csd.gov.za to obtain your vendor number.
Pricing schedule	Yes	Duly completed
SBD 4- Bidders Disclosure	Yes	Duly completed and signed.
SBD 6.1 Preference points claim form in terms of Preferential Procurement Regulation 2022	No	Duly completed and signed.
Adherence to closing date and time	Yes	Submission by the due date and time

7.3. Evaluation Stage Two: Functionality Evaluation

7.3.1. Bidders are expected to obtain a minimum of seventy-five (75) out of hundred points available to proceed to the next evaluation stage. Failure to obtain the prescribed points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

FUNCTIONALITY EVALUATION CRITERIA

#	Evaluation Criteria	Weight	Score Matrix	
1.	Bidder Experience The bidder must have successfully developed, implemented, maintained and supported a WhatsApp Business solution in the past three (3) years, in organisations with requirements comparable to those of the OPFA. The bidder must also demonstrate experience in integrating the WhatsApp Business Platform with third-party systems Documentary evidence of this experience must be provided, supported by verifiable reference letters. The information submitted must include the following: • Name of the organisation • Name of the contact person • Contact telephone number(s) • Contract duration and nature of services rendered.	25	5	Three or more letters submitted where WhatsApp Business Solution was implemented
			4	Two letters submitted where WhatsApp Business Solution was implemented
			3	One letter submitted where WhatsApp Business Solution was implemented
			2	Letters submitted but do not meet all requirements
			1	No information submitted or irrelevant information
2.	Project Team Experience The bidder must submit at least three (3) CVs for proposed project team members, each demonstrating a minimum of two (2) years' experience in the development, implementation, integration, maintenance, and support of a WhatsApp Business solution.	30	5	Bidder submitted CV of three experienced technical resource with experience demonstrating a minimum of two (2) years' experience in the development, implementation, integration, maintenance, and support of a WhatsApp Business solution.
			4	Bidder submitted CV of two experienced technical resources with experience demonstrating a minimum of

#	Evaluation Criteria	Weight	Score Matrix	
				two (2) years' experience in the development, implementation, integration, maintenance, and support of a WhatsApp Business solution.
			3	Bidder submitted CV of one experienced technical resource with experience demonstrating a minimum of two (2) years' experience in the development, implementation, integration, maintenance, and support of a WhatsApp Business Solution.
			2	CV submitted with no relevant experience in WhatsApp implementation
			1	No relevant information provided
3.	Project Plan The bidder must submit a project plan for delivering the solution in six (6) months, including key phases, activities, timelines, milestones, deliverables, dependencies, risks, resource allocation, and a proposed go-live approach.	15	5	Detailed project plan submitted and project will be completed within 4 months
			4	Detailed project plan submitted and project will be completed within 5 months
			3	Detailed project plan submitted and project will be completed within 6 months

#	Evaluation Criteria	Weight	Score Matrix	
4			2	Project plan submitted exceeds 6 months
			1	No Project plan submitted
	Methodology and Proposal The bidder must provide a clear and detailed approach to how the solution will be implemented as per the scope: This should included but not limited to: Data Protection and Security: demonstrate the security controls, data protection and privacy measures will be implemented to protect, secure and manage OPFA and customer data. The evidence must clearly demonstrate how unauthorised access to OPFA and customer data by WhatsApp, Meta or any third party will be prevented. Backup and Business Continuity: Outline the backup, disaster recovery and restoration procedures, and demonstrate how these will meet the OPFA’s business continuity requirements. Local Support and SLA Capability The bidder must have local presence in South Africa and confirm its ability to provide post-implementation maintenance and support services in line with the service levels set out in the bid and must submit details of its support model, escalation procedures, support hours and response time.	30	5	The proposal exceeds/meets all requirements
			4	The proposal adequately meets all requirements
			3	The proposal moderately meets all requirements
			2	The proposal does not meet all requirements
			1	No information submitted
TOTAL FUNCTIONALITY POINTS			100	
MINIMUM POIINT REQUIRED TO PROCEED TO NEXT STAGE			75	

7.4. Evaluation Stage Three: Price and Preference Point System

7.4.1. The 80/20 preference point system shall be applicable to this bid, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represent the specific goals. Points will be awarded to a bidder for attaining the specific goals outlined in accordance with the table below:

#	Specific Goals of Preference	Proof/ Evidence required	Points Allocation
1	51% or more ownership by black people	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	5
2	51% or more ownership by black women	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	5
3	30% or more ownership by people living with disabilities	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	3
4	30% or more ownership by youth	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	3
5	EME/QSE	CSD report/B-BBEE Certificate or Sworn Affidavit, CIPC Report	4
TOTAL POINTS			20

8. REGISTRATION WITH CENTRAL SUPPLIER DATABASE

- 8.1. The OPFA will not award any bid to a supplier who is not registered as a prospective supplier on the Central Supplier Database (CSD) as required in terms of National Treasury National Treasury SCM Instruction Note 4A of 2016/2017.
- 8.2. Bidders must provide CSD registration number on the SBD Registration can be made at <https://secure.csd.gov.za>

9. FIRM PRICING SCHEDULE

	Reference to scope	Amount excluding VAT
Project Implementation <i>(6 months) project phase</i>	4	
Maintenance and Support <i>(18 months) post implementation</i>	5.1 -5.2	
Continuous Improvements	5.4	
Other (specify)		
TOTAL BID PRICE EXCLUDING VAT		
VAT		
TOTAL BID PRICE INCLUDING VAT		
BID PRICE IN WORDS		

Bidders may use their own template, but the final price must be transferred to this schedule. Use the extra columns to specify items not included.

7. GENERAL UNDERTAKINGS

The following shall be applicable to this request for proposals:

- 8.1. The OPFA will not accept the bid, if the OPFA is satisfied that any person (including an employee, partner, director or shareholder of the tenderer or a person acting on behalf of or with the knowledge of the tenderer), firm or company:
 - 8.2. Is restricted from doing business with the state or employed by the state
 - 8.3. Has in any manner been involved in a corrupt act in relation to or other gift or remuneration to any officer or employee of the OPFA in connection with obtaining or executing a contract.
 - 8.4. Has acted in bad faith, in a fraudulent manner or committed an offence in obtaining or executing a contract.
 - 8.5. Has in any manner influenced or attempted to influence the awarding of OPFA's bid.
 - 8.6. Has, when advised that their tender has been accepted, given notice of his inability to execute or sign the contract.
 - 8.7. Has engaged in any anti-competitive behaviour, including having entered into any agreement or arrangement, whether legally binding or not, with any other person, firm or company to refrain from tendering for this contract, or relating to the tender price to be submitted by either party.
 - 8.8. Has disclosed to any other person, any information relating to this bid, except where disclosure, in confidence, was necessary to obtain quotations required for the preparation of the tender or required by law.
 - 8.9. The OPFA may, in addition to any other legal recourse which it may have, cancel the contract between the OPFA and such a person and/or resolve that no tender from such a person will be considered for a specified period.
 - 8.10. The award of this tender may be subjected to price negotiation with the highest point scorer in terms of the preferential procurement regulation if the price offered is considered not to be market related.

9. TENDER BRIEFING

- 9.1. There will be NO tender briefing session on this project; for any enquiries/clarity bidders must send enquiries to the designated mail tenders@pfa.org.za not later than **18 September 2026**. Enquiries received after this date will not be responded to.

10. TENDER SUBMISSIONS

- 10.1. Completed documents with supporting annexures shall be packaged, sealed, clearly marked and submitted on or before the closing date and time **(29 September 2026 at 11h00)**.

Bids must be hand delivered to the OPFA's address as follows
41 Matroosberg Road
Riverwalk Office Park
Block A, Fourth Floor
Ashlea Gardens
Pretoria

- 10.2. Late submissions and bids submitted by means of e-mail, telegram, telex facsimile, electronic or similar means shall not be considered.

11. BID VALIDITY PERIOD

- 11.1. Bid validity period will be 120 days from the closing of the tender.

12. ADDITIONAL INFORMATION REQUIRED

- 12.1. The following additional information is required: A sworn declaration that a bidder:

- Is not participating in or contributing to any retirement fund for its employees.
- Is participating and contributing to a pension or provident fund, and contributions are not in arrears. As proof, a confirmation of their contribution status from their retirement fund administrator must be submitted together with the declaration.

NB: This declaration is required as part of the risk assessment, which may impact on the overall outcome of the bid

13. PROTECTION OF PERSONAL INFORMATION

- 13.1. "Personal Information" means personal information as defined in the Protection of Personal Information Act, 2013 (Act No. 4 of 2013), as amended from time to time.
- 13.2. All information collected and submitted by the bidders will be used by the OPFA for the evaluation and adjudication of this bid to determine the bidders' suitability and compliance to deliver the goods/services required. By submitting this bid the bidder gives consent for the OPFA to process the personal information provided by the bidder accordingly.
- 13.3. The parties acknowledge that for the purposes of this bid and agreement the parties may come into contact with, or have access to PI and other information that may be classified, or deemed as private or confidential and for which the other party is responsible. Such PI may also be deemed or considered as private and confidential as it relates to any third party who may be directly or indirectly associated with this agreement. Further, it is acknowledged and agreed by the parties that they have the necessary consent to share or disclose the PI and that the information may have value.
- 13.4. The parties agree that they will at all times comply with POPIA's Regulations and Codes of Conduct and that it shall only collect, use and process PI it comes into contact with pursuant to this agreement in a lawful manner, and only to the extent required to execute the services, or to provide the goods and to perform their respective obligations in terms of this agreement.
- 13.5. The parties agree that it shall put in place, and at all times maintain, appropriate physical, technological, and contractual security measures to ensure the protection and confidentiality of PI that it, or its employees, its contractors or other authorised individuals comes into contact with pursuant to this agreement.
- 13.6. Notify each other immediately where it has reasonable grounds to believe that the Personal Information in respect of this agreement, which has been provided to it including any Personal Information which it has processed, has been lost, destroyed, or accessed or acquired by any unauthorised person.

- 13.7. Unless so required by law, the parties agree that it shall not disclose any PI as defined in POPIA to any third party without the prior written consent of the other party, and notwithstanding anything to the contrary contained herein, shall any party in no manner whatsoever transfer any PI out of the Republic of South Africa.
- 13.8. The bidder has a right to request the OPFA to correct, delete, and destroy its PI in terms of POPIA using form 2 of the POPIA Regulations. The bidder also has the right to object the processing of its PI using form 1 of the POPIA Regulations. The rights of the bidder as a data subject are contained in the OPFA POPIA Policy, which can be viewed on the OPFA website.

ANNEXURE: HIGH LEVEL TECHICAL OVERVIEW OF THE RESPOND CASE MANAGEMENT SYSTEM

1. This overview provides a snapshot of the core business system that the WhatsApp Business Solution will integrate with, including the underlying technology on which it is built on and its integration capabilities. This technical overview is limited to the information relevant to the scope of the proposed solution.

2. Summary

- 2.1. Respond is an Enterprise Case Management solution built on Microsoft .NET technologies to capture and act on customer feedback and complaints quickly. Respond provides tools to consolidate customer complaints, analyse the data and arrive at the root cause of the complaints to address the issue. Respond provides the core applications to support the specific needs of users across the organisation, from front-line staff to Case Managers.

3. Respond Integration – APIs

- 3.1. Respond Integration Application Programming Interfaces (API's) provide integrators with a way to create and modify entities in the Respond Case Management System.
- 3.2. The Respond web application provides a number of REST based services that provide integration capabilities. These services allow Respond application functionality to be integrated within other applications. The services are built using REST principles while returning and consuming XML. This should allow them to be used by the broadest spectrum of consumers.
- 3.3. The web services enable a third-party application to:
 - 3.3.1. Retrieve a case
 - 3.3.2. Create a case
 - 3.3.3. Update a case
 - 3.3.4. Run a search

STANDARD BIDDING FORMS

SBD 1: PART A: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE OFFICE OF PENSION FUNDS ADJUDICATOR					
BID NUMBER:	OPFA/ICT/032026	CLOSING DATE: 29 SEPTEMBER 2026		CLOSING TIME:	11:00
DESCRIPTION	IMPLEMENTATION OF WHATSAPP BUSINESS SOLUTION				
BID RESPONSE DOCUMENTS MUST BE SUBMITTED : 4th floor, Riverwalk Office Park					
41 Matroosberg Road , Ashlea Gardens, Menlyn					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	LUFUNO BALIBALI		CONTACT PERSON	Magadi Tshitannye	
TELEPHONE NUMBER	012 748 4002		TELEPHONE NUMBER	012 748 4048	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	tenders@pfa.org.za		E-MAIL ADDRESS	tenders@pfa.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] Yes No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] Yes 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?	Yes No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		Yes No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?			☐ YES ☐ NO		
DOES THE ENTITY HAVE A BRANCH IN THE RSA?			☐ YES ☐ NO		
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?			☐ YES ☐ NO		
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?			☐ YES ☐ NO		
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?			☐ YES ☐ NO		
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

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, **2022**, THE GENERAL CONDITIONS OF CONTRACT (GCC) [General Conditions of Contract.pdf](#) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, **YES/NO** employed by the state?

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned,
(name)..... in submitting the
accompanying bid, do hereby make the following statements that I certify to be true
and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

¹ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature Date

.....
Position Name of bidder

SBD 6.1 PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

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

1. GENERAL CONDITIONS

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

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

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

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

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

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation.
- (b) “**price**” means an amount of money tendered for goods or services and includes all applicable taxes less all unconditional discounts.
- (c) “**Rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes.
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**The Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

1.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10	
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$		$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	

Where

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

1.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

1.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10	
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$		$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	

Where

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

Pmax = Price of highest acceptable tender

2. POINTS AWARDED FOR SPECIFIC GOALS

- 2.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 2.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system: or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
51% or more ownership by black people	5	
51% or more ownership by black women	5	
30% or more ownership by people living with disabilities	3	
30% or more ownership by youth	3	
EME/QSE	4	
Total points allocated	20	
Number of points claimed by the bidder		

DECLARATION WITH REGARD TO COMPANY/FIRM

2.3. Name of company/firm.....

2.4. Company registration number:

2.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

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

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS: