RFP NUMBER:	RFP/SASSETA/26271102
DESCRIPTION:	Appointment of a service provider to render institutional readiness assement for SASSETA for a period of three (3) years from the date of appointment
PUBLISH DATE:	03 September 2026
CLOSING DATE:	28 September 2026
CLOSING TIME:	11h00 am
COMPULSORY BRIEFING SESSION DATE	N/A
VALIDITY PERIOD:	120 days from the closing date
PREFERENCE POINT SYSTEM	80/20
BID RESPONSES TO BE SUBMITTED ELECTRONICALLY:	Proposals are to be submitted electronically via email to **institutional@sasseta.org.za** for the attention of Ms. Kholo Leshabane, quoting the reference (RFP/SASSETA/26271102)
ATTENTION:	Ms. Kholo Leshabane
The email address (**institutional@sasseta.org.za**) is for the submission of tender proposals only and will be accessed by SASSETA after the tender closing date and time. Queries related to this tender are to be sent to **scm02@sasseta.org.za.**	

NB: The SASSETA logo and other intellectual property rights are owned by SASSETA and are protected by applicable intellectual property laws. Unless authorized in writing, you are prohibited from using the SASSETA logo or any of its intellectual property in any manner whatsoever. Any unauthorized use of the SASSETA Logo may result in legal action.

If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 162 111 for further investigation.

DOCUMENTS IN THIS BID DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

SECTION A

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

SECTION B

1. Invitation to Quote (SBD 1)
2. Pricing Schedule (SBD 3.3)
3. Bidder's Disclosure (SBD 4)
4. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
5. Submission Checklist
6. General Conditions of Contract (Annexure A)
7. Pricing Template (Annexure B)

1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

1.1 FRAUD AND CORRUPTION

1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

1.2 COMPULSORY BRIEFING SESSION

1.2.1 There will be no briefing session for this Request for Proposal.

1.3 CLARIFICATIONS/QUERIES

1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Kholo Leshabane** at **scm02@sasseta.org.za** by **12H00** on **18 September 2026.** The **bid number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted**.

1.4 SUBMITTING BIDS

1.4.1 Proposals to be submitted electronically via email to **institutional @sasseta.org.za** (**maximum size of the email 30 MB)**

- Bidders are advised to compress their submission(s) to a maximum of 30MB file/folder**. Any submission(s) exceeding 30MB will be automatically rejected by the server**.
- Submission(s) can be made through email and WeTransfer. **Bidders are advised NOT to set an expiry date on the submission(s) made**. If a Bidder's response is found to have expired during the evaluation period, it will be considered non-responsive. Bidders who chose to submit via WeTransfer are encouraged to ensure that they have a license for the platform as without it, the submission will automatically expire within seven (7) days.
- Bidders must not submit their responses via **Google Drive or any other method that will compel** SASSETA to request access and/or create an email address out of SASSETA's domain (sasseta.org.za). Such responses will be considered non-responsive.
- Bidders are advised to double check their submission(s) before responding to the bid.

❖ Closing date and time: **28 September 2026 @ 11h00**

1.5 LATE BIDS

1.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

1.6 NEGOTIATION

1.6.1 SASSETA has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

1.7 REASONS FOR REJECTION

1.7.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

1.7.2 SASSETA shall disregard the bid of any bidder if that bidder, or any of its directors:

1.7.2.1 have abused the Supply Chain Management systems of SASSETA.

1.7.2.2 have committed proven fraud or any other improper conduct in relation to such systems.

1.7.2.3 have failed to perform on a contract and the proof exists.

1.7.3 Such actions shall be communicated to the National Treasury.

2 TERMS OF REFERENCE

2.1 INTRODUCTION AND BACKGROUND

2.1.1 SASSETA is one of the twenty-one Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's licence has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.

2.2 PURPOSE

2.2.1 SASSETA seeks to appoint a competent and experienced service provider to undertake an institutional capability assessment that evaluates:

2.2.1.1 The deployment readiness and fitness-for-purpose of the Institutional Systems ;
2.2.1.2 The adequacy of SASSETA's enterprise ICT infrastructure, architecture, and information security environment;
2.2.1.3 Alignment between Solutions, ICT strategy, enterprise architecture, and data governance frameworks;
2.2.1.4 Organisational readiness, change capacity, and digital skills required to sustain digital transformation; and
2.2.1.5 The effectiveness and future potential of automation enabled through current solutions and associated digital platforms.

The assessment is intended to support informed executive decision-making by the Office of the Chief Executive Officer and to ensure that system deployment and future digital investments are aligned to institutional capacity, governance requirements, and strategic objectives.

2.2.2 In performing the above work the service provider must ensure compliance with the following legislation and other related legal frameworks

2.2.2.1 Provision of Access to Information Act (PAIA)
2.2.2.2 Promotion of Administrative Justice Act (PAJA)
2.2.2.3 Public Finance Management Act (PFMA)
2.2.2.4 Protection of Personal Information Act (POPIA)
2.2.2.5 Electronic Communications and Transaction Act (ECTA)
2.2.2.6 International Organization Standardization (ISO9001- quality management system)
2.2.2.7 Minimum Information Operation ability Standard (MIOS)
2.2.2.8 Minimum Information Security Standard (MISS)

2.3 SCOPE OF WORK

2.3.1 INSTITUTIONAL CAPABILITY ASSESSMENT

2.3.1.1 The appointed service provider will be required to execute the scope of work through a structured, phased approach over an estimated period of three years. The scope comprises the following interrelated phases:

2.3.1.1.1 **Phase 1: Solution Validation and Deployment Readiness -** The objective of this phase is to confirm, through structured assurance testing, that the developed solutions are aligned to approved requirements, operationally fit for purpose, and technically ready for deployment.

This phase includes but is not limited to:

2.3.1.1.1.1 **End-to-End Requirements Alignment and Solution Assurance**

- Review of Business Requirements and Functional Requirements documentation;
- Verification of alignment between approved requirements and delivered system functionality;
- Identification of gaps, deviations, or deferred requirements;
- Assessment of system usability, technical performance, and operational fitness;
- Evaluation of system alignment with existing business processes and identification of required process changes;
- Identification of deployment risks, constraints, and remediation actions

2.3.1.1.1.2 **Technical Performance and Practical Usability Assessment**

- Assess system functionality, reliability, workflows and performance under realistic usage scenarios and projected user loads.
- Evaluate practical usability from the end-user perspective across defined user groups and roles.
- Identify technical defects, performance bottlenecks, and usability constraints that may materially affect processes.
- Assess user interface suitability relative to organisational digital literacy levels, including accessibility and ease-of-use considerations where applicable.

2.3.1.1.2 **Phase 2: Enterprise ICT Infrastructure Readiness Assessment -** The objective of this phase is to assess whether the organisation's enterprise ICTinfrastructure can support future deployment and broader digital operations.

This phase may include but not limited:

- Evaluate server, network, storage, and database capacity, performance, and scalability.
- Assess cloud readiness and suitability of current deployment models.
- Review cybersecurity controls, compliance posture, and information security readiness.
- Evaluate disaster recovery, backup, and business continuity capabilities.
- Assess system integration architecture and middleware capability across the enterprise.
- Identify infrastructure constraints, dependencies, or vulnerabilities that may affect deployment timelines, system performance, or sustainability.
- Determine infrastructure upgrade, optimisation, or alternative deployment requirements.

2.3.1.1.3 **Phase 3: ICT Strategy, Architecture, and Data Alignment Evaluation -** The objective of this phase is to assess strategic coherence between current organisational solutions, the organisation's ICT strategy, and its broader digital transformation trajectory.

This phase will include but is not limited to:

- Evaluate alignment between current solutions and the ICT strategy and digital roadmap.
- Assess compliance with enterprise architecture principles (TOGAF) and technology standards.
- Review data governance maturity, data quality controls, and data management practices.
- Assess data architecture readiness to support reporting, analytics, and decision-making.
- Evaluate interoperability with existing systems and future integration requirements.
- Review ICT governance processes, decision-making mechanisms, and accountability frameworks.

2.3.1.1.4 **Phase 4: Organisational Readiness and Change Capacity Assessment.** The objective of this phase is to assess whether the organisation possesses the people, structures, and cultural capacity required to adopt, use, and sustain the current solutions and future digital systems.

This phase will include but not limited to:

- Assess organisational digital literacy levels and technical competencies across user groups.
- Identify skills gaps, training requirements, and capacity-building needs.
- Evaluate organisational readiness for change, including cultural receptiveness and change saturation.
- Assess the adequacy of change management capability, communication readiness, and stakeholder engagement mechanisms.
- Assess leadership support, role clarity andgovernance

2.3.1.1.5 **Phase 5: Environment Effectiveness Assessment -** The objective of this phase is to evaluate the effectiveness of current solutions deployment in enabling automation outcomes previously identified by the organisation.

This phase will include but not limited to:

- Assess the extent to which current solutions enable or constrained automation opportunities identified in prior automation assessments.
- Evaluate realised versus anticipated automation benefits following current solutions deployment.
- Identify residual manual processes, inefficiencies, or system-related bottlenecks.
- Assess alignment between implemented system functionality and the organisation's automation objectives.

2.3.1.1.6 **Phase 6: Enterprise Automation Execution and Digital Modernisation -** The objective of this phase is to execute targeted automation interventions across the organisation, informed by the consolidated evidence and groundwork completed in all preceding phases.

This phase marks the transition from assessment and design into active implementation, with the explicit aim of eliminating residual manual processes and modernising organisational operations.

By this stage, system readiness, infrastructure capability, data integrity, governance alignment, and organisational change capacity will have been established.

Accordingly, this phase is focused on implementation rather than evaluation.

This phase will include but not limited to the following:

- Implement approved automation interventions to replace manual, paper-based, fragmented, or duplicative business processes.
- Configure and operationalise automated workflows across integrated systems in line with defined future-state process models.
- Enable end-to-end process automation through system configuration, workflow orchestration, and system integration.
- Decommission or significantly reduce reliance on legacy manual processes, parallel systems, and informal workarounds.
- Embed automated controls, audit trails, and reporting mechanisms to strengthen governance, compliance, and accountability.
- Support organisational adoption through targeted enablement, operational support, and stabilisation activities.
- Monitor early operational performance of automated processes to confirm effectiveness and sustainability.

2.1 MANDANDTORY REQUIREMENTS

2.1.1 The service provider to ensure compliance to the Protection of Personal Information Act (POPIA). The bidder is required to submit a valid registration certificate with the Information Regulator of South Africa in the name of the bidding company.

2.1.2 Certified project manager/team leader: valid Project Management Certification (PMP).

2.1.3 Bidding Company to be ISO/IEC 27001:2022 certified. A valid certificate to be submitted.

NB.: Non submission of the above will lead to automatic disqualification.

2.2 SKILLS AND EXPERIENCE OF THE BIDDING COMPANY AND THE TEAM MEMBERS PROPOSED FOR THE ASSIGNMENT

2.2.1 Bidding company to provide a proposed methodology & technical approach which should include:

- Comprehensive, phase-by-phase methodology.
- Structured testing approach with specific tools.
- Stakeholder engagement plan.
- Data quality controls.
- Ethical and security considerations.
- Be explicitly aligned to all deliverables.

2.2.2 Bidding company should demonstrate team capability, qualifications & key roles by having the below:

- Highly experienced team.

- All roles that exceed requirements.
- Demonstrable experience in each specialist domain.
- Clear role-to-deliverable matrix and confirmed availability.

2.2.3 The submitted CV of the **Project Manager/Team Leader to demonstrate a minimum of five (5) years of experience within the field of IT consulting.** Bidders to submit a comprehensive CV and/or also complete the CV template on the attached Annexure B.

2.2.4 Bidding company should demonstrate relevant experience & references through five or more comparable ICT assurance / system readiness assignments with contactable references and letters

NB. The bidder should provide a team structure/organogram of the team members proposed for this assignment as well as the roles of the various team members in relation to the scope of work.

2.3 TIMEFRAMES FOR DELIVERY OF THE WORK

2.3.1 The assignment will be for a period of three years from the date of appointment.

2.4 PRICING

2.4.1 Service Providers are requested to provide an all-inclusive price on SBD 3.3 of this tender.

2.5 ACCOUNTABILITY AND REPORTING

2.5.1 The service provider will report directly to the Office of the CEO for the duration of the assignment.

2.6 SUBMISSION OF THE GENERAL CONDITIONS OF CONTRACT (GCC)

2.6.1 Bidders are requested to initial each page of the General Conditions of Contract (GCC) (Annexure A) and submit their response to this Request for Quotations. The GCC will form part of the contract with the successful Bidder.

2.7 INTELLECTUAL PROPERTY

2.7.1 The service provider will be contracting with SASSETA. All data of this project, in whatever format raw or analyzed, will be confidential information for utilisation by SASSETA. All information and documents received from SASSETA is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the SLA.

2.8 PROTECTION OF PERSONAL INFORMATION ACT

2.8.1 All Service Providers are to take note of the implications of POPI Act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:

2.8.1.1 All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.

2.8.1.2 The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives Act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

2.8.1.3 SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of the information provided.

2.8.1.4 SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.

3 PROPOSED SELECTION CRITERIA

3.1 Compliance with minimum requirements

3.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions.

3.2 Conditions for selection/shortlisting

3.2.1 **Phase 1 – Service Providers to:**

- Submit their proposal by the closing date and time. **Proposals submitted after the closing date and time will be disqualified from further evaluation.**
- The service provider to ensure compliance to the Protection of Personal Information Act (POPIA). The bidder is required to submit a valid registration certificate with the Information Regulator of South Africa in the name of the bidding company. **Non-submission of a valid registration certificate(s) with the Information Regulator of South Africa will lead to automatic disqualification.**
- Submit valid Project Management Certification (PMP) certificate for the project manager/team leader. **Non-submission of a valid Project Management Certification (PMP) certificate will lead to automatic disqualification.**
- Bidding Company to be ISO/IEC 27001:2022 certified. A valid certificate to be submitted. **Non-submission of a valid ISO/IEC 27001:2022 certificate will lead to automatic disqualification.**
- Complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD 1, SBD 3.3, SBD 4, SBD 6.1
- Be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with the proposal

3.2.2 **Phase 2 – Functionality evaluation**

3.2.3 **Functionality evaluation**

Bidders who meet the mandatory items requirements above will be evaluated on functionality requirements on a scale of 0 to 2:

0: Document/item not submitted; Unacceptable, does not meet set criteria; Weak, less than acceptable. Insufficient for performance requirements
1: Satisfactory should be adequate for stated element.
2: Very good, above average compliance to the requirement

ELEMENT	FUNCTIONALITY EVALUATION		FUNCTIONALITY WEIGHT	TOTAL SCORE
	Rating out of 2	**Evaluation criteria**		
Proposed Technical approach and methodology of the company:				
Bidding company to provide a proposed methodology & technical approach which should include: ➢ Comprehensive, phase-by-phase methodology. ➢ Structured testing approach with specific tools. ➢ Stakeholder engagement plan. ➢ Data quality controls. ➢ Identification of project risks and mitigations. ➢ Ethical and security considerations. ➢ Be explicitly aligned to all deliverables. **(30 points)**	0	No methodology included/methodology that does not relate to the scope of work	30	
	1	Methodology and Project plan that adheres to the terms of reference and includes: ➢ Comprehensive, phase-by-phase methodology. ➢ Structured testing approach with specific tools. ➢ Stakeholder engagement plan. ➢ Data quality controls.		
	2	Methodology and Project plan that adheres to the terms of reference and includes: ➢ Comprehensive, phase-by-phase methodology. ➢ Structured testing approach with specific tools. ➢ Stakeholder engagement plan. ➢ Data quality controls. ➢ Identification of project risks and mitigations. ➢ Ethical and security considerations. ➢ Explicitly aligned to all deliverables		

Suitability of the proposed team:				
The submitted CV of the **Project Manager/Team Leader to demonstrate a minimum of five (5) years of experience within the field of IT consulting.** Bidders to submit a comprehensive CV and/or also complete the CV template on the attached Annexure B. **(30 points)**	0	The lead team member /Project manager does not have a minimum of five (5) years' experience within the field of IT consulting management/ CV and/or Annexure B of the lead team member/Project manager not attached	30	
	1	The lead team member submitted a comprehensive CV and/or Annexure B (CV Template) demonstrating five (5) years of experience undertaken within the field of IT Consulting		
	2	The lead team member submitted a comprehensive CV and/or Annexure B (CV Template) demonstrating six (6) years and/or more of experience undertaken within the field of IT Consulting		
Suitability of the bidding Company:	**Rating out of 2**	**Evaluation criteria**		
Bidding Company to demonstrate a minimum of three (3) assignments in comparable ICT assurance / system readiness assessments. Each assignment to be supported by a signed reference letter on the letterhead of previous clients and must be relevant to this tender **(40 Points)**	0	The Bidding Company does not demonstrate the number of successfully implemented assignments in the records management system/The Bidding Company did not attach a minimum of three (3) signed reference letters.	40	
	1	Bidding Company demonstrated three (3) successfully implemented records management system assignments and three (3) signed reference letters on the clients' letterhead supporting the experience are attached		
	2	Bidding Company demonstrated four (4) or more successfully implemented records management system assignments and four (4) or more signed reference letters on the clients' letterhead supporting the experience are attached		
TOTAL POINTS			**100%**	

N/B: Bidders must score a minimum of one (1) in each of the elements above. Bidders who score a zero in any of the elements will be disqualified from further evaluation.

Bidders must meet minimum functionality points of 70% in order for them to be shortlisted . Bidders who score less than 70% for functionality will be eliminated from further evaluation.

3.2.4 **Phase 4 – Price and Specific Goals**

- **The value of this bid is estimated not to exceed R6 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where** 80 points will be allocated to price and 20 points for Specific Goals as follows:

Evaluation Criterion on Price and Specific Goals	
The relative competitiveness of proposed price	80
Specific Goals	20
TOTAL FOR PRICE AND PREFERENCE	**100**

3.2.5 **ADJUDICATION OF BID**

- The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points or it may be a lower scoring bid based on firm, verifiable, and justifiable grounds or no award at all.

PART A - INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (*NAME OF DEPARTMENT/ PUBLIC ENTITY*)					
BID NUMBER:	**RFP/SASSETA/26271102**	CLOSING DATE:	**28 September 2026**	CLOSING TIME:	**11H00**
DESCRIPTION	**Appointment of a service provider to render institutional readiness assement for SASSETA for a period of three (3) years from the date of appointment**				

PROPOSALS TO BE EMAILED:			
Proposals to be submitted electronically via email **Institutional@sasseta.org.za** for the attention of **Ms. Kholo Leshabana**			
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	**Ms. Kholo Leshabana**	CONTACT PERSON	**Ms. Kholo Leshabana**
E-MAIL ADDRESS	**scm02@sasseta.org.za**	E-MAIL ADDRESS	**scm02@sasseta.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 PART B:3]

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) 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 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.

NAME OF SIGNATORY ……

SIGNATURE OF BIDDER: ……

N/B.: If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

N/B.: If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

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

DATE: ……...

SBD 3.3

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: ……..	BID NO.: **RFP/SASSETA/26271102**
CLOSING TIME: **11h00**	CLOSING DATE: **28 September 2026**

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

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)

1. The accompanying information must be used for the formulation of proposals.

2. Service Providers are requested to provide an all-inclusive cost of this project with the following clearly indicated:

FIXED COSTS:

Item No.	**Item**	**Costs (Incl. VAT *where applicable)***
1	Phase 1: Solutions Validation and Deployment Readiness	**R**
2	Phase 2: Enterprise ICT Infrastructure Readiness Assessment	**R**
3	Phase 3: ICT Strategy, Architecture, and Data Alignment Evaluation	**R**
4	Phase 4: Organisational Readiness and Change Capacity Assessment	**R**
5	Phase 5: Post-Deployment Automation Effectiveness Assessment	**R**
6	Phase 6: Enterprise Automation Execution and Digital Modernisation	**R**

Total	**R**

NB: Bidders will be allowed an annual escalation on the anniversary of the contract linked to CPIX in that particular anniversary month.

Bidders are to complete the name and surname of the proposed Team Leader on this assignment and ensure that a comprehensive CV is attached to the proposal:

NO	ROLE IN THE TEAM	NAME AND SURNAME (Only one name to be recorded)	IS CV ATTACHED *(Circle the response below)*
1.	Team Leader		Yes/No

…….. ……
Signature **Date**

…….. …….....
Position **Name of bidder**

(To be signed by a duly Authorised Delegate. A signed Company Resolution to be submitted)

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

1.1 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, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

1.2 If a person is 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. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution? **YES/NO**

2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	**Identity Number**	**Name of organ of state**

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

2.3.1 If so, furnish particulars:

……
……
……

2.4 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**

2.4.1 If so, indicate all companies registered in the CSD in the table below:

Supplier registration number (MAAA)	Status (active/inactive/deleted)

Failure to disclose all CSD-registered active companies linked to all Directors will lead to disqualification**.**

3 GENERAL DECLARATION

I, ……....., the undersigned, 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 to be false.

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.

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.

3.5 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.

3.6 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.

3.7 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, 1998 (Act No. 89 of 1998) and or may be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE ABOVE IS CORRECT.

I ACCEPT THAT THE PROCURING INSTITUTION MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME IF THIS DECLARATION IS FALSE.

……	……
Signature	Date
……	……...
Designation	Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENTREGULATIONS 2022

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

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

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1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R1 000 000 (all applicable taxesincluded).

1.2 To be completed by the organ of state

The applicable preference point system for this quotation is the **80/20** preference point system.

a) The lowest acceptable quotation will be used to determine the accurate system once quotationsare received.

1.3 Points for this quotation (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:

1.5 The maximum points for this quotation are allocated as follows:

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

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

1.7 The organ of state reserves the right to request a bidder, either before a quotation is adjudicated orat any time subsequently, to substantiate any claim in regard to preferences, in any manner requiredby the organ of state.

2. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

2.1 POINTS AWARDED FOR PRICE

2.1.1 THE 80/20 PREERENCE POINT SYSTEMS

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

80/20

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for the price of the quotation under consideration

Pt = Price of the quotation under consideration

Pmin = Price of lowest acceptable quotation

2.2 POINTS AWARDED FOR SPECIFIC GOALS

a) In terms of Regulations 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 quotation.

b) For the purposes of this quotation, the bidder 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 bid:

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

The specific goals allocated pointsin terms of this bid	**Number of points allocated (80/20 system)**	**Bidders to record the number of points claimed in the rows below (To be completed by the bidder)**
At least 100% Black people Ownership	10.00	
At least 30% Women Ownership	5.00	
At least 30% Black youth ownership	5.00	
Total	**20.00**	

NB: Specific goals will not be rewarded to bidders who do not record their points in the table above.

3. DECLARATION WITH REGARD TO COMPANY/FIRM

3.1 Name of company/firm…….

3.2 Company registration number: ……...

3.3 TYPE OF COMPANY/ FIRM

3.3.1 Partnership/Joint Venture / Consortium
3.3.2 One-person business/sole propriety
3.3.3 Close corporation
3.3.4 Public Company
3.3.5 Personal Liability Company
3.3.6 (Pty) Limited
3.3.7 Non-Profit Company
3.3.8 State-Owned Company[TICK APPLICABLE BOX]

3.4 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 quotation, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;
ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4and 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 bidding process;
   (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
   (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
   (d) recommend that the bidder 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 BIDDER(S)

SURNAME AND NAME: ……..

DATE: ……

ADDRESS: ……

……

……

DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.

b) Certified copy/ies of Identity documents of the Company Directors

c) CSD report

d) Shareholder Certificates

NB.: Non-submission of the documents required above will lead to specific goal points NOT beingawarded.

…….. **....……**

Signature **Date**

…….. **…….....**

Position **Name of bidder**

(To be signed by a duly authorised Delegate. A signed Company Resolution must be submitted).

BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:

NO	DETAILS - Bidders are to set out their bid in the following format:	TICK BY BIDDER
1.	**Part 1:** Completed and signed the invitation to bid document (SBD 1) **To be signed by a duly Authorised Delegate.**	
2.	**Part 2:** Completed and signed pricing schedule (SBD 3.3) **To be signed by a duly Authorised Delegate.**	
3.	**Part 3:** Completed and signed the Bidder's disclosure form (SBD 4). *(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid* to *complete and sign the declaration of interest document).* **To be signed by a duly Authorised Delegate**	
4.	**Part 4:** Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1) **To be signed by a duly Authorised Delegate. Not claiming points as per SBD 6.1 will lead to Specific Goals points not awarded**	
5.	**Part 5:** Submitted the General Conditions of Contract (initialed each page)	
6.	**Part 6:** Bidders National Treasury Central Supplier Database (CSD) forms indicating the validity of the bidder's registration	
7.	**Part 7:** Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3	
8.	**Part 8:** The service provider to ensure compliance to the Protection of Personal Information Act (POPIA). The bidder is required to submit a valid registration certificate with the Information Regulator of South Africa in the name of the bidding company. **Non-submission of a valid registration certificate(s) with the Information Regulator of South Africa will lead to automatic disqualification.**	
9.	**Part 9:** Submit valid Project Management Certification (PMP) certificate for the project manager/team leader. **Non-submission of a valid Project Management Certification (PMP) certificate will lead to automatic disqualification.**	
10.	**Part 10:** Bidding Company to be ISO/IEC 27001:2022 certified. A valid certificate to be submitted. Non-submission of a valid ISO/IEC 27001:2022 certificate will lead to automatic disqualification.	
11.	**Part 11:** The submitted CV of the Project Manager/Team Leader to demonstrate a minimum of five (5) years of experience within the field of IT consulting. Bidders to submit a comprehensive CV and/or also complete the CV template on the attached Annexure B.	
12.	**Part 12:** The submitted CV of the Project Manager/Team Leader to demonstrate a minimum of five (5) years of experience within the field of IT consulting**.** Bidders to submit a comprehensive CV and/or also complete the CV template on the attached Annexure B.	
13.	**Part 13: Bidders to submit the following documents. Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT beingawarded.**	
	An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.	
	Certified copy/ies of Identity documents of the Company Directors	
	CSD report	

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