



THE NATIONAL ECONOMIC DEVELOPMENT & LABOUR COUNCIL

14A Jellicoe Avenue, NEDLAC House,
Rosebank PO Box 1775, Saxonwold, 2132

INVITATION TO TENDER

**REQUEST FOR PROPOSALS FOR FIT-FOR-PURPOSE FOR ENTERPRISE RESOURCE
PLANNING**

BID NUMBER:	Nedlac 2024/25/03
BID ISSUE DATE:	13 May 2024
CLOSING DATE AND TIME:	10 June 2024 at 11am
BID VALIDITY PERIOD	90 days (COMMENCING FROM THE BID CLOSING DATE)
COMPULSORY CLARIFICATION MEETING	22 May 2024 <u>Join the meeting now</u>
DESCRIPTION OF SERVICE/GOODS	REQUEST FOR PROPOSALS FOR FIT-FOR-PURPOSE FOR ENTERPRISE RESOURCE PLANNING
SUBMISSION OF BID	<u>DEPOSITED IN THE TENDER BOX SITUATED AT:</u> Nedlac offices (Reception Area) 14A Jellicoe Avenue, Rosebank.
PROCUREMENT ENQUIRY	Name : Mrs Sibongile Pheeha Tel no : 011 328 4200/ 060 771 0835 Email : sibongile@nedlac.org.za
TECHNICAL ENQUIRY	Name : Mr Benedict Mokgothu Email : Benedict@nedlac.org.za

TABLE OF CONTENTS

	Page
1. SCM BID DOCUMENT SBD 1.....	3
2. FIXED PRICING SCHEDULESBD 3.3.....	5
3. SCM BID DOCUMENTS SBD.4	7
4. SCM BID DOCUMENTS SBD.6.1	10
5. CERTIFICATE FOR JOINT VENTURES	15
6. CERTIFICATE OF ATTENDANCE	16
7. ANNEXURE A – TERMS OF REFERENCE	17

PART A INVITATION TO TENDER

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE NEDLAC					
BID	NEDLAC 2024/25/03	CLOSING DATE:	10 June 2024	CLOSING	11:00 AM
DESCRIPTION	REQUEST FOR PROPOSALS FOR FIT-FOR-PURPOSE FOR ENTERPRISE RESOURCE PLANNING				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
NEDLAC HOUSE					
14A JELlicoe AVENUE					
ROSEBANK					
RECEPTION AREA – TENDER BOX					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	SIBONGILE PHEEHA		CONTACT PERSON	Benedict Mokgothu	
TELEPHONE	011 328 4200		TELEPHONE	011 328 4200	
FACSIMILE			FACSIMILE NUMBER		
E-MAIL ADDRESS	sibongile@nedlac.org.za		E-MAIL ADDRESS	benedict@nedlac.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE	CODE		NUMBER		
CELLPHONE					
FACSIMILE	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATI					
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	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? IS

YES NO

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, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO 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.

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

☐☐

DATE:

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO.:
CLOSING TIME 11:00	CLOSING DATE:

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

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

- Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

- PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	.....	R.....	
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	.....	R.....	.....
	.....	R.....	days
	.....	R.....	.....
	.....	R.....	days
	.....	R.....	.....
5.1	Travel expenses (specify, for example rate/km and total km, class of air travel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.		

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
---------------------------------------	------	----------	--------

.....	.....	.....	R.....
.....	.....	.....	R.....
.....	.....	.....	R.....
.....	.....	.....	R.....

TOTAL: R.....

**** "all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....			R.....
.....			R.....
.....	.		R.....
.....			R.....
.....			R.....
.....	.		R.....
TOTAL.....			

6. Period required for commencement with project after acceptance of bid
7. Estimated man-days for completion of project
8. Are the rates quoted firm for the full period of contract? *YES/NO
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
.....
.....

***[DELETE IF NOT APPLICABLE]**

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

2.2

Full Name	Identity Number	Name of State institution

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:

.....

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:

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.

.....
.....

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.

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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD
THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

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

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**

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

- 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) BBBEE

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

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
BBBEE	20
Total points for Price and BBBEE	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{min} = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

$$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an

organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.
(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 BBBEE allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Level 1	10	20		
Level 2	8	16		
Level 3	5	10		
Level 4	4	8		
Level 5	3	6		
Level 6-8	0	0		

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to

any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	.....
DATE:	.....
ADDRESS:	.....
	
	
	

CERTIFICATE FOR JOINT VENTURES

This Returnable Schedule is to be completed by EACH member of a joint venture submitting a proposal.

We, the undersigned, are submitting this proposal offer in Joint Venture and hereby authorize

Mr / Ms.....,

Authorized signatory of the Company.....

Acting in the capacity of lead JV partner, to sign all documents in connection with the proposal offer and any contract resulting from it on our behalf as a joint venture.

NAME OF JV ORGANISATION.....

ADDRESS:.....

.....

.....

DULY AUTHORISED SIGNATORY NAME

DESIGNATION:.....

SIGNATURE.....

DATE:.....

PROOF OF ATTENDANCE AT THE COMPULSORY CLARIFICATION SESSION / SITE MEETING

CERTIFICATE OF ATTENDANCE AT SITE VISIT AND CLARIFICATION MEETING

This is to certify that (*tenderer*)

of (*address*)

..... was represented by the person(s) named below at the compulsory meeting held for all tenderers at

(*location*).....

..... on (*date*)..... starting at (*time*)

I / We acknowledge that the purpose of the meeting was to acquaint myself / ourselves with the site of the works and / or matters incidental to doing the work specified in the tender documents in order for me / us to take account of everything necessary when compiling our rates and prices included in the tender.

Particulars of person(s) attending the meeting:

Name: Signature:

Capacity:

Name:..... Signature:

Capacity:

Attendance of the above person(s) at the meeting is confirmed by the Employer's (Nedlac) representative, namely:

Name: .. Signature:

Capacity: Date and Time:

TERMS OF REFERENCE FOR REQUEST FOR PROPOSALS FOR FIT-FOR-PURPOSE ENTERPRISE RESOURCE PLANNING

1. PURPOSE

The purpose of this RFP is to seek a qualified service provider to implement an Enterprise Resource Planning (ERP) system with the following modules for the National Economic Development and Labour Council (Nedlac) and the Presidential Climate Commission (PCC):

- 1.1. Human Resource Management
- 1.2. Financial Management
- 1.3. Supply Chain Management
- 1.4. CRM/Stakeholder Management

2. CONTEXT

NEDLAC's is a Schedule 3 A public entity focusing on facilitating policy development and input into legislation by organised labour, business and community with a single office in Rosebank, Johannesburg. Information on Nedlac can be obtained by visiting our website at www.nedlac.org.za.

The PCC is an advisory body consisting of commissioners and a secretariat, developing policy recommendations, scientific research and engaging in stakeholder engagement on issues of climate change and the just transition.

There are about 50 staff members (users) who need to relate and engage with up to 150 stakeholders regularly and over 500 from time to time. NEDLAC is an information intensive environment. Decision-making authority is mandatory in its business model because it is required to facilitate complex stakeholder engagements with precision and speed. Operationally, this implies that the Enterprise Resource Planning (ERP) and the Enterprise Content Management systems and other adjacent applications need to be coherent and synchronised. It is important that NEDLAC demonstrates operational excellence through stable processes and information communications technology.

It is envisioned that the PCC may, after two years, require a download of their data should they onboard their own ERP capability. In the meantime, their requirement is to continue to utilise NEDLAC's ERP capability.

NEDLAC has hybrid information technology under the Microsoft Office 365 Tenant with a combination of traditional on-premises and cloud-based solutions. NEDLAC has an existing SAGE ERP solution with Evolution, VIP, ESS, finance, supply chain and human resource modules.

This RFP reflects a continuous improvement effort in that the organisation, historically, has not been realising the full potential of the existing solution, but expects to do so from the new

solution as a function of competent implementation, training and change management activities.

The envisaged benefits of implementing this ERP include:

- Elimination / reduction of manual processes through automation;
- Elimination of data silos;
- Improved data collection and access;
- Enforced regulation compliance;
- Replacement of outdated legacy-based ICT services;
- Improved employee access to systems and digital services; and
- Increased employee satisfaction.

3. SCOPE OF WORK

The scope of work is to implement an upgraded, fit-for-purpose ERP system. This will entail system implementation, integrations, training and upskilling and support services for a period of 3 years. The business requirements of the envisioned ERP platform are as follows:

FINANCE COMPONENT (Finance Dept.)	
Capability Group	Requirements
Financial Management	• Budgeting & Forecasting • Profitability Analysis • Cost Management • Revenue Management • Financial Analysis & Decision Support • Financial Asset and Cash Management • Account Receivable Management • Account Payable Management
Financial Planning and Analysis	• Project Budgeting & Costing • Budgeting & Planning
Financial Reporting & Compliance	• External Reporting • Internal Reporting • Financial Regulation Compliance • Audit Management
Treasury & Capital Management	• Cash Management • Capital Expenditure Planning • Risk Management • Investment Management
Sourcing & Procurement	• Supplier Management • Contract Management • Purchase Order Management • Strategic Sourcing
HUMAN CAPITAL COMPONENT (H.R. Dept.)	
Human Resource Planning	• Workforce Planning • Succession Planning • Organizational Structure & Design
Performance Management	• Performance Planning • Quarterly performance Review • Performance Appraisal • Feedback & Coaching • Communication Automation

	Document Management
Learning & Development	- Training Delivery - Skills Assessment - Training Needs Analysis
Personnel Data Administration	- Employee Data Management - Compliance Data Management
Benefits Management	- Employee Benefits Administration - Health & Wellness Management
Payroll	- Payroll Processing - Payroll Tax Compliance
ASSET MANAGEMENT COMPONENT (Finance Dept.)	
Asset Management	- Asset Performance Evaluation - Asset Audit Management - Asset Distribution and Tracking - Asset Redeployment and Disposal - Asset Tracking and Identification - Asset Verification and Reconciliation - Asset Maintenance Planning and Execution - Asset Preventive Maintenance - Asset Acquisition - Asset Usage and Maintenance - Asset Decommissioning and Disposal
CRM / STAKEHOLDER MANAGEMENT COMPONENT (Stakeholder Management Dept.)	
Stakeholder Identification and Analysis	- Identifying Stakeholders - Assessing Stakeholder Needs and Interests - Stakeholder Segmentation and Prioritization
Stakeholder Engagement	- Stakeholder Communication Planning - Stakeholder Relationship Building - Stakeholder Engagement Execution - Stakeholder Management
Stakeholder Feedback Management	Capturing Stakeholder Feedback
Stakeholder Relationship Maintenance	- Analysing and Interpreting Stakeholder Feedback - Implementing Feedback-Based Improvements - Maintaining Ongoing Stakeholder Communication - Managing Stakeholder Issues and Concerns - Ongoing Stakeholder Relationship Evaluation

4. PROJECT TIMELINES

Project implementation is envisioned to commence in Q2, 2024 (i.e. 1st of July 2024).

5. PRICING REQUIREMENTS

Pricing requirements must be inclusive of all applicable taxes (e.g. VAT) and consideration should be given to the following:

- Data migration costs from the current systems to the proposed system
- Annual license fees for 50 users of a fully integrated enterprise resource planning system for a period of 3 years (with annual escalations included).
- Costs and quality of ongoing maintenance and support of the ERP system to be provided.

6. SUBMISSION OF DOCUMENTS

- 6.1. A Technical proposal outlining the approach and methodology as to the execution of the terms of reference.
- 6.2. A Financial proposal indicating all the cost assumptions and cost breakdown of the assignment. This includes pricing schedule.
- 6.3. Proof that the firm is in good standing with the South African Revenue Services (SARS).
- 6.4. Company registration documents
- 6.5. Completed SBD documentation.
- 6.6. Proof of Central Supplier Database (CSD) registration.
- 6.7. Entity ownership type and BBBEE certificate or affidavit.
- 6.8. Company profile, including CVs and qualifications of the relevant individuals assigned to the project, which must clearly demonstrate the necessary skills and experience in the areas of expertise listed below.
- 6.9. Contactable references, supported by signed reference letters (please refer to the functionality table below).
- 6.10. Details of similar projects conducted within the past 10 years (Four (4) projects).
- 6.11. The project manager must have bachelor's degree/ Diploma in ICT/ Business Systems

7. SELECTION AND EVALUATION CRITERIA

As this procurement is expected not to exceed a maximum of R50 million, the 80/20 preferential procurement measure is applicable. To achieve specific goals, a maximum of 20 points will be awarded to a tenderer based on their B-BBEE level of contribution as determined within the Nedlac SCM policy.

The selection and evaluation criteria are comprised of the following four (4) phases:

- 7.1. Phase one: Compliance in line with the Nedlac Procurement Policy and submission of the requirement documentation.
- 7.2. Phase two: The scoring matrix below will apply. The minimum functionality points of seventy (70) is required to qualify for phase three.
- 7.3. Phase three: Presentation (Top 3 scoring bidders on functionality)
- 7.4. Phase four: Price and specific goals.

Functionality criteria:

Criteria	Guidelines	Scoring	Maximum Score
Project Implementation Plan	- Detailed methodology and approach for successful project implementation - Comprehensive implementation plan with proposed timelines - Processes and structures for solution roll out - Skills and expertise to maintain support and continuously improve the ERP solution - Technical Architecture support - The preferred bidder shall ensure that the recommended architecture is also able to provide for test, quality assurance and production environments	30 – The proposal is comprehensive and has detailed support management methodology. 15 – The methodology is coherent but has gaps in terms of demonstrating how it will deliver on the project objectives. 0 – The methodology is incoherent or has	30

		major gaps in terms of demonstrating how it will deliver on the project objectives.	
Experience of the organisation in terms of providing system support, maintenance, and development services for an Enterprise Resource Planning (ERP) system	Bidders should attach reference letters where ERP systems were successfully implemented at other companies within the last 10 years. The letters must contain a brief description of the services provided and be on client letterheads and signed by the client. Reference letters will only be considered valid if the following conditions are met: • On an official letterhead • For work conducted within the last 10 years • Are signed and dated by the client.	10 – Submitted 4 valid reference letters. 5 – Submitted 3 valid reference letters. 0 - Submitted less than 3 less valid reference letters.	10
Experience of the Project Manager	The recommended project manager CV detailing the experience and expertise including the number of years in enterprise software development, support and maintenance, which is verifiable. The project manager must have bachelor's degree/ Diploma in ICT/ Business Systems Submit CV of the proposed Project Manager	30 - 10 years and above of project experience as the Project Manager in system development, support with Project Management Professional (PMP) Certification, Prince 2 or other methodology would advantageous. 20 - 6 to 9 years of project experience as the Project Manager in system support. 10 – 5 years of project experience as the Project Manager in system support. 0 - less than 5 years of project experience as the Project Manager in system support.	30
System Demonstration	• Bidders must conduct a comprehensive demonstration of the proposed ERP system to showcase its functionality and alignment with the project's technical evaluation criteria.	30 - The system demonstrates full compliance with technical proposal, meeting or exceeding all evaluation criteria.	30

	The demonstration should be scheduled with the Bid Evaluation Committee and cover all essential aspects of the system's operation.	15 - The system adequately covers the requirements, with only minor gaps observed in meeting criteria. 0 - The system does not adequately address the requirements.	
TOTAL			100

APPENDIX D: PRESENTATION & DEMO REQUIREMENTS

The top 3 scoring bidders will be invited to provide a live demonstration of the proposed ERP solution. The demonstration will be used to determine how the solution complies with the modules as mentioned in section 4.

For the presentations to be held, the functionality score (100 percent) will be adjusted, whereby 80 percent will be awarded to bidders during the bid evaluation and 20 percent will be for presentation scores.

Functionality criteria for the presentation will be made available to the shortlisted top 3 service providers who met functionality.

A full agenda will be prepared and submitted to bidders at least 2 weeks prior to the scheduled demonstration.

8. SUBMISSION AND ENQUIRES

- 8.1. Bidders should deliver their completed bids and accompanying document at 14A Jellicoe Avenue, Rosebank, 2196 on or before 10 June 2024 at 11h00. **Although submissions are physical, service providers will upon request by Nedlac after the closing date and time, be expected to submit a soft copy of their submissions electronically.**
- 8.2. A compulsory briefing session will be convened via MS Teams on 22 May 2024 at 10h00. The following link can be used to access the session. Click here [Join the meeting now](#) to join the meeting
- 8.3. Any questions regarding the RFP should be emailed to Benedict@nedlac.org.za.
- 8.4. Note that no late proposals will be considered.
- 8.5. Nedlac reserves the right to cancel this bid should such be deemed necessary.

9. APPENDIX A: PRICING SCHEDULE

PRICING INSTRUCTIONS

- a. Bidders are required to provide a detailed price proposal per the Cost Schedule Summary table below. Please ensure that all cost associated with the full implementation are accounted for in the total bid price.
- b. Payments will be linked to specified milestones after such deliverables have been approved by NEDLAC.
- c. NEDLAC reserve the right to consider the guidelines on consultancy rates as set out in the National Treasury Instruction 03 of 2017/2018.
- d. NEDLAC does not intend to customize the functions of the ERP solution that is going to be adopted, however, the following requirements must be considered by the service provider:
 - a. Development of interfaces to share or extract data from external / legacy systems.
 - b. Conversion and transfer of data between ERP modules and legacy or other systems.
 - c. Enhancing features of the ERP without disturbance / need to modify the core modules.

NEDLAC requires a Fixed-Term contract of 3 years. 1 year of implementation. 3 years of support and 50 user licenses.

COST SCHEDULE SUMMARY

The table below summarises the potential bidders quote for the respective ERP modules shown in the table in section 4 (Scope of Work) including common integration and implementation issues associated with each module.

Activity / Deliverable	Description	Cost (Excl. VAT)
Common (For all modules)	Planning – All Modules • Risk management plan. • Project Management Plan • Configuration Management Plan • Communication Plan	R
	Change Management – All Modules • Readiness Assessment Report • Training Management Plan	R
	Change Management Execution – All Modules • Engagement and Training sessions with work groups	R
Integration	• Integration with SharePoint • Integration to the Central Supplier Database (CSD)	R
Software Cost for Different Modules	SCM	R
	Finance	R
	HR	R
	Payroll	R
	Stakeholder Management	R
	Programme Management	R
Total (Excl VAT)		R

VAT		R
Total (Incl VAT)		R

APPENDIX B: INFORMATION & BUSINESS REPORTING REQUIREMENTS

The tables below list the indicative reporting requirements within the modules of the ERP.

FINANCIAL MANAGEMENT

Supplier / Vendor Listing	Payment Reports
Order Reports	General Ledger
Trial Balance	Debtors Reports
Creditors Report	Asset Register
Advances & Guarantees Reports	VAT Reports
Budget Reports	Financial Analysis & Exception Reports

HR AND PAYROLL

Monthly Variance Reports	Tax Calculation
Personnel Statistics	Analytical Reporting
Remuneration	Staff Composition
Age Analysis	Organograms
ER Reporting	Occupational Categories
Training Report	Training Applications
Actual Training	Training Cost Per BU
Bursary Reports with Staff Composition Added	Bursary Cost (Internal & External)
Succession Planning Report	Performance Management Report
EMP201	EMP501
Payroll Tax Register	Reconciliation Report for IRP5 & ITA88
Variance Report	Total Earnings & Deductions Report
SARS Income & Deduction Codes	Payslip Elements Report
List of Bank Payments: Salaries & 3 rd Party	Audit Trail Report
Calendar Reminders Report	Employees Changing Age Group Report

SUPPLY CHAIN MANAGEMENT

Supplier Database Reports that give BBBEE levels and other vendor information	Open Requisitions and Orders
Approver & Buyer Efficiency Report	Spending Reports by Cost Centre
Bid Reports	Contract Register
Received Quotations / Bids Reports	Outstanding / Overdue Requirements Report
Un-actioned Requirements Report	Lapsed RFX Validity Report
Commodity / Item Description Report	Requirements Management Report

Expenditure Analysis Report	Demand Plan Report
Procurement Plan Report	Order Management Report
Stock Management Report	Needs Analysis Report

STAKEHOLDER MANAGEMENT

Meeting attendance (virtual and physical)	Stakeholder database - linked to core functions / chambers / task teams / social partners
Employee experience – qualitative scoring	Team group membership
External stakeholder experience – qualitative scoring	Stakeholder groups (for events, invitations, etc.)
Stakeholder permissions and rights	Stakeholder communications workflow status
Polling results	

APPENDIX C: NON-FUNCTIONAL REQUIREMENTS

The table below lists the non-functional requirements (NFR) that the bidder must comply with.

Requirement	Description
Availability	The system must be always available: 24x7x365
Efficiency	The system's resource demands must be comparable to norm and not exceed the norm for web-based systems
Security	The system must implement POPIA and must grant access to only users that are granted to use it.
Accessibility	The system must be accessible through the WAN and the LAN.
Performance	Web page response times must be comparable to fast performance averages, at worst 3 seconds.
Compatibility	The system must be compatible with all mobile devices. Specifically, Android and iOS.
Resilience	The services of the system and data must be recoverable within reasonable times from any catastrophic event.
Data Confidentiality & Integrity	Audit trails will be used to trace user access and behaviour, also to ensure system integrity through verification.