

A.INTRODUCTION TO TENDER.....6

1. Introduction6

2. Briefing session.....6

3. Bid enquiries and questions.....6

4. Tender submission7

5. Pricing schedule7

B.DEFINITIONS.....8

6. Definitions8

C.TENDER RULES9

7. Capabilities and experience of bidders.....9

8. Form of tender.....9

9. Signing of bid.....9

10. Bid all inclusive.....9

11. Alterations to bid documents9

12. Qualifications on tender9

13. FAIS Ombud’s rights.....9

14. Undertaking by bidder10

15. Central supplier database.....11

16. Supplier performance management11

17. Cancellation of contract.....11

18. Applicable laws.....12

19. Reasons for disqualification of bid13

20. Delegation of authority13

21. Bid rules are binding.....13

22. Language of contract13

D.TERMS OF REFERENCE14

23. Objectives.....14

24. Background.....14

25. Scope of work.....15

26. Services required.....15

27. Other services (not to be quoted for)17

28. Service level17

29. Pricing Schedule.....18

30. Bid evaluation19

ISSUE DATE			PAGE 4 OF 35
TITLE	FAIS202324-T002 [PROVISION OF SIEM SERVICES]	INITIAL HERE →	BIDDER’S INITIALS

	1.4 The bidder is required to provide a solution that outlines designs and encompasses all components such as diagrams or structures.	1.4.1 A solution proposal does not include design or diagrams	0	20	
		1.4.2 The provided solution proposal outlines designs, or all components such as diagrams or structures.	5		
2. Certification	2.1 In addition to the mandatory certification listed under paragraph 33, bidders must submit the following Cybersecurity certification. (i) Certified Information Systems Auditor (CISA) certification (ii) Certified in Risk and Information Systems Control (CRISC) certification (iii) CompTIA Security+ Certification, (iv) CompTIA Advanced Security Practitioner (CASP+). (v) Systems Security Certified Practitioner (SSCP). (vi) Global Information Assurance Certification (GIAC) (vii) Security Essentials Certification (GSEC) (viii) GIAC Certified Incident Handler (GCIH); (ix) Offensive Security Certified Professional (OSCP);	2.1 Certification not provided	0	10	10
		2.2 Submitted any of the three (3) listed certificates demonstrating the qualifications of the resources who will be responsible for the proposed solution.	3		
		2.3 Submitted any of the four (4) listed certificates demonstrating the qualifications of the resources who will be responsible for the proposed solution.	4		
		2.4 Submitted any of the five (5) or more listed certificates demonstrating the qualifications of the resources who will be responsible for the proposed solution.	5		

TOTAL

100

32. Preference point system

32.1 General conditions

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

32.1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for Price and Specific Goals.

32.2 The maximum points for this tender are allocated as follows:

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

32.3 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.

32.4 The organ of state reserves the right to require 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.

32.5 Formulae for procurement of goods and services

32.5.1 Points awarded for price

32.5.1.1 The 80/20 Preference Point Systems

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

80/20

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

Where

P_s = Points scored for the price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

32.6 Points awarded for specific goals

32.6.1 The applicable preference points for this tender is 80/20. While 80 will be allocated for price and 20 for specific goals indicated in table 5 below.

Table 4

SPECIFIC GOALS ALLOCATED POINTS	80/20 PREFERENCE POINTS ALLOCATED	PROOF OF CLAIM FOR A SPECIFIC GOAL	
≥ 51% black owned	10	BEE Certificate/Sworn Affidavit/Latest CSD report	
≥ 31 % black women-owned	6	BEE Certificate/Sworn Affidavit/Latest CSD report	
QSE or EME	4	BEE Certificate/Sworn Affidavit/Latest CSD report	
Total	20		

33. Additional information required:

33.1 The following compulsory additional information is required. Failure to complete and supply any of these documents will lead to disqualification of this bid.

Table 5

ELIGIBILITY/MANDATORY REQUIREMENT	COMPLY	NOT COMPLY
(i) Proof of registration on the National Treasury Central Supplier Database with a compliant tax status		
(ii) Submission of completed SBD 1		
(iii) Submission of completed SBD 3.1		
(iv) Submission of completed SBD 4		
(v) Submission of completed SBD 6.1		
(vi) Submission of quotation		
(vi) The bidders must submit three (3) reference letters from clients where they have successfully provided similar service within the last 5 years from the closing date of the bid. The year in which similar service was provided must be indicated in the letter (<i>in case where reference letter does not indicate the date on which similar service was provided, the award letter or purchase order must be provided together with the reference letter</i>).		

<p>(v) The bidder must furnish the following certifications verifying the qualifications of the resources who will be responsible for the proposed solution.</p> <p>(a) Information Security Manager (CISM) certification</p> <p>(b) Information Systems Security Professional (CISSP),</p> <p>(c) Certified Ethical Hacker (CEH);</p>		
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34. Timeline of the bid process

34.1 The period of validity of the tender and the withdrawal of offers, after the closing date and time are 90 days, expiring on **28 April 2024**. The project timeframes of this bid are set out below:

Table 6

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on Government e-tender portal /print media / Tender Bulletin	12 December 2023
2.	Deadlines for submission of questions relating to bid by the bidders	16 January 2024
3.	Bid closing date	29 January 2024
5.	Compliance: Bid Evaluation Committee	31 January 2024
6.	Functional Evaluation: (Desktop)	5 February 2024
8.	Preference Point System: Evaluation	7 February 2024
9.	Bid Award: Bid Adjudication Committee	12 February 2024
10.	Notification of the outcome to the bidders	14 February 2024

34.2 All dates and times in this bid are South African Standard Time.

34.3 Any time or date in this bid is subject to change at the FAIS Ombud’s discretion. The establishment of a time or date in this bid does not create an obligation on the part of the FAIS Ombud to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if the FAIS Ombud extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

E. STANDARD BIDDING DOCUMENTS

Standard Bidding Document (SBD 1)

PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	FAIS 2023/24 - T002	CLOSING DATE:	29 January 2023	CLOSING TIME:	11H00
DESCRIPTION	SUPPORT AND MAINTENANCE OF CRM MICROSOFT DYNAMIC 365 SYSTEM				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
MENLYN CENTRAL OFFICE BUILDING, 11 TH FLOOR					
125 DALLAS AVENUE					
WATERKLOOF GLEN					
PRETORIA, 0010					
ALL QUESTIONS RELATING TO THE CONTENTS OF THE TENDER (CONDITIONS, RULES, TERMS OF REFERENCE ETC.) MUST BE FORWARDED IN WRITING VIA EMAIL TO TENDERS@FAISOMBUD.CO.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	
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

FOR THE GOODS /SERVICES OFFERED?			
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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.

Standard Bidding Document (SBD 3.1)

PRICING SCHEDULE – FIRM PRICES
(Purchases)

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

NAME OF BIDDER.....	BID NUMBER.....
CLOSING TIME 11:00	CLOSING DATE.....

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

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
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- Required by:
- At:
- Brand and model
- Country of origin
- Does the offer comply with the specification(s)? *YES/NO
- If not to specification, indicate deviation(s)
- Period required for delivery
- *Delivery: Firm/not firm
- Delivery basis

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

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

*Delete if not applicable

ISSUE DATE			PAGE 27 OF 36
TITLE	FAIS202324-T002 [PROVISION OF SIEM SERVICES]	INITIAL HERE →	BIDDER'S INITIALS

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.

Full Name	Identity Number	Name of State institution

¹the 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.

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

2.1.2 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**

2.1.3 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.
- 3.5 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.

^{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.

ISSUE DATE			PAGE 29 OF 36
TITLE	FAIS202324-T002 [PROVISION OF SIEM SERVICES]	INITIAL HERE →	BIDDER'S INITIALS

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

1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for price and specific goals.

1.3 The maximum points for this tender are allocated as follows:

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

1.4 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.

1.5 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 Preference Point Systems

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

80/20

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2 POINTS AWARDED FOR SPECIFIC GOALS

- 3.2.1 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 this tender the tenderer will be allocated points based on the goals stated in table below as may be supported by proof/ documentation stated in the conditions of this tender:

ISSUE DATE			PAGE 32 OF 36
TITLE	FAIS202324-T002 [PROVISION OF SIEM SERVICES]	INITIAL HERE →	BIDDER'S INITIALS

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

.. Table 7

THE SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM)	NUMBER OF POINTS CLAIMED (80/20 SYSTEM) (TO BE COMPLETED BY THE TENDERER)	PROOF OF CLAIM FOR A SPECIFIC GOAL
≥ 51% black owned	10		BEE Certificate/Sworn Affidavit/Latest CSD report
≥ 31 % black women owned	6		BEE Certificate/Sworn Affidavit/Latest CSD report
QSE or EME	4		BEE Certificate/Sworn Affidavit/Latest CSD report
TOTAL	20		

4. DECLARATION WITH REGARD TO COMPANY/FIRM

4.1 Name of company/firm.....

4.2 Company registration number:

4.3 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]

4.4 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 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.

ISSUE DATE			PAGE 34 OF 36
TITLE	FAIS202324-T002 [PROVISION OF SIEM SERVICES]	INITIAL HERE →	BIDDER'S INITIALS

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

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....

F. ADMINISTRATIVE CHECKLIST

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

Table 8

ITEM	DOCUMENT REFERENCE	ACTION TO BE TAKEN	YES/NO
1.	SBD 1	Invitation to bid	Is the form duly completed and signed?
2.	SBD 3.3	Pricing Schedule	Is the form duly completed and signed?
3.	SBD 4	Declaration of Interest	Is the form duly completed and signed?
4.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly completed, B-BBEE points claimed and the form signed?
5.	B-BBEE status level verification certificate		Is proof of the B-BBEE Status level of the contributor attached?
6.	Proof of registration on the National Treasury Central Supplier Database (CSD)		Is the National Treasury Central Supplier Database (CSD) report attached?
8.	Tender submission		Two (2) printed copies (one original and one (1) copy of the original submitted?)
			One (1) electronic copy submitted?

I, the undersigned (name) certify that the information furnished on this checklist is true and correct.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

ISSUE DATE			PAGE 36 OF 36
TITLE	FAIS202324-T002 [PROVISION OF SIEM SERVICES]	INITIAL HERE →	BIDDER'S INITIALS