

## REQUEST FOR BID

**Reference:** GTAC 005-2019

**Description:** ESTABLISHMENT OF A GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) PANEL OF PROFESSIONAL SERVICE PROVIDERS FOR A PERIOD OF THREE (3) YEARS – BATCH 1

**Date advertised:** 18 October 2019

**Non-compulsory briefing session:**

**Date and time:** 01 November 2019 at 10h00 to 12h00.

**Venue:** National Treasury, 40 Church Square, at Budget Council Room

**Closing date:** 14 November 2019

**Closing time:** 11h00

**Tender Box:** GTAC Offices, 24<sup>th</sup> Floor, 240 Madiba Street, Pretoria

**Batch 1 Categories include the following:**

- ✓ Actuarial Services
- ✓ Statistics and Data Analysis
- ✓ Financial Management
- ✓ Supply Chain Management

## Table of Contents

<b>1</b>	<b>INTRODUCTION</b> .....	<b>3</b>
<b>2</b>	<b>GTAC OVERVIEW</b> .....	<b>4</b>
2.1	Capital Projects Appraisal Services .....	4
2.2	Institutional Development and Support: IDS .....	5
2.3	Public Expenditure and Policy Analysis Services.....	5
2.4	Municipal Finance Improvement Programme Services .....	5
2.5	Jobs Fund Service.....	5
2.6	Transaction Advisory Service and Public Private Partnership (TAS and PPP) .....	6
<b>3</b>	<b>PURPOSE OF THIS REQUEST FOR BID</b> .....	<b>6</b>
<b>4</b>	<b>NON-COMPULSORY BRIEFING SESSION</b> .....	<b>6</b>
<b>5</b>	<b>DURATION OF PANEL</b> .....	<b>7</b>
<b>6</b>	<b>PROJECTED TIMELINES OF THE BID PROCESS</b> .....	<b>7</b>
<b>7</b>	<b>CONTACT</b> .....	<b>7</b>
<b>8</b>	<b>GTAC PANEL APPROACH</b> .....	<b>8</b>
<b>9</b>	<b>MANDATORY REQUIREMENTS</b> .....	<b>8</b>
<b>10</b>	<b>EVALUATION AND SELECTION CRITERIA</b> .....	<b>9</b>
<b>11</b>	<b>INSTRUCTIONS FOR COMPLETION AND SUBMISSION OF BID PROPOSALS</b> ....	<b>11</b>
<b>12</b>	<b>TAX COMPLIANCE STATUS</b> .....	<b>12</b>
<b>13</b>	<b>COMMUNICATION</b> .....	<b>12</b>
<b>14</b>	<b>ANNEXURE A: BID EVALUATION CRITERIA FOR ACTUARIAL CATEGORY</b> .....	<b>13</b>
<b>15</b>	<b>ANNEXURE B: BID EVALUATION CRITERIA FOR STATISTICS AND DATA ANALYSIS CATEGORY</b> .....	<b>14</b>
<b>16</b>	<b>ANNEXURE C: BID EVALUATION CRITERIA FOR FINANCIAL MANAGEMENT CATEGORY</b> .....	<b>16</b>
<b>17</b>	<b>ANNEXURE E: BID EVALUATION CRITERIA FOR SUPPLY CHAIN MANAGEMENT CATEGORY</b> .....	<b>17</b>

## 1 INTRODUCTION

The Technical Advisory Centre (GTAC) was promulgated through a Legal Notice (35194) published in the Government Gazette on 30 March 2012. The Head office is located in the National Treasury at 240 Madiba Street, Pretoria.

The GTAC objective is to assist Organs of State in building their capacity for efficient, effective and transparent financial management. The functions of GTAC are:

- To render technical consulting services to Centre of Government Departments and Organs of State;
- To provide specialised procurement support for high-impact government initiatives;
- To render advice on the feasibility of infrastructure projects;
- To provide knowledge management for projects undertaken; and
- Anything ancillary to the functions listed in this subparagraph.

(\*Sect. 2 (1) and (2) of the Schedule, Government Notice 261, 30 March 2012.; The Centre of Government Departments are National Treasury, DPME, DPSA and CoGTA).

The GTAC requires that a panel is established to functionally address a range of diverse skills, experience and competencies needed. These terms of reference provide the basis through which this will be done. The panel will be procured in different batches as individual bids. A list of thirty-one (31) categories of Management Services was identified as indicated below. The highlighted categories (1-4) will form part of Batch 1. Other categories (5-31) will follow in the subsequent batches.

### **# Category of Management Services list**

**1 Actuarial Services**

**2 Financial Management**

**3 Statistics and Data Analysis**

**4 Supply Chain Management**

5 Project Finance

6 Agriculture

7 Auditing

8 Built Environment

9 Business Development and Management

10 Coaching and Facilitation

11 Development Economics

12 Economic Management

13 Environmental Management

14 Grant Development and Management

15 Human Resource/Capital Development

16 Information Communication Technology Management

17 Knowledge Management

18 Legal

19 Marketing and Communication

- 20 Monitoring and Evaluation
- 21 Organizational Development and Change Management
- 22 Political Economics
- 23 Programme Management
- 24 Project Management
- 25 Public Finance
- 26 Public Policy Analysis and Management
- 27 Research and Development
- 28 SMME
- 29 Strategic Development and Planning
- 30 Systems Development and Implementation
- 31 Transaction Advisory Management Services

## **2 GTAC OVERVIEW**

GTAC's founding Notice indicates that it provides services to its clients, including agreements with the National Treasury, centre-of-government departments and organs of state. Its services are typically initiated by a request from a client organ of state.

GTAC operates within the general guidance provided by the Minister of Finance. The Minister may, subject to applicable legislation, instruct it to:

- Provide services regarding financial planning for and the costing of policies that are being developed.
- Provide economic analysis and actuarial advice on programmes and projects.
- Perform other functions that are complementary or additional to the functions listed.

GTAC projects are delivered through the use of a combination of highly skilled technical officials and long-term advisors who form the basis of the technical expertise in the organisation.

GTAC services encompass a number of business areas as set out below. More information on the organisation and its work may be found on the GTAC website.

### **2.1 Capital Projects Appraisal Services**

- The unit assists the National Treasury in its review and assessment of infrastructure proposals to ensure value for money, affordability and efficiency in infrastructure expenditure. It provides analytical and advisory capacity to facilitate the appraisal of large, strategic and complex projects.
  - The areas in which the services are provided include transport, water and sanitation, energy, telecommunications, health and education.
  - Types of experts needed to support the services include: Financial modellers, Spatial Planners; Economists; Financial Analysts; Engineers; Environmental Specialists; Policy Analysts and Sector Experts.

## **2.2 Institutional Development and Support (IDS)**

- These services are provided to Government and Organs of state to build their capacity for better financial management and improved service delivery. These services include strengthening skills, capacity to conceptualise, planning and delivery on mandates.
- The areas in which these services are provided are Education; Economic Development; Health; Human Settlements; and Municipalities.
- Types of experts needed to support these GTAC service are: Legislative Analysts; Economists; Actuarial Scientists; Performance Management; Leadership Development; Change Management; Strategists; Procurement; Business Process Management; Operations Management Spatial and Town Planners.

## **2.3 Public Expenditure and Policy Analysis Services**

- The Public Expenditure and Policy Analysis unit provides analysis of and insights into the performance, cost effectiveness and expenditure trends of government programmes by:
  - Conducting performance and expenditure reviews which scrutinise expenditure patterns and programme performance data, and cost the implications of legislative changes and policy choices across all spheres of government, public entities and frontline service delivery sites;
  - Capacitating responsible authorities to perform their own analyses using the proven methodologies; and
  - Analysing personnel expenditure trends for sectors including Education, Health, Justice and central administration departments using payroll and other relevant datasets, including tax and survey data.
- The types of experts needed to support this service delivery are: Public Sector Economists; Monitoring and Evaluation Experts; Public Sector Micro Economists; Financial Modellers; Reporting Writing; Statisticians and Big Data Analysts; Infographers.

## **2.4 Municipal Finance Improvement Programme Services**

- These services are provided to build capacity of financial management of municipalities at local and provincial levels.
- The types of services needed to support these GTAC services are Municipal and Provincial Financial Management Experts; a wide range of municipal financial expertise such as MSCOA experts, Supply Change Management Experts, Budgeting and Reporting; Asset Management; and Audit Findings Resolution Management.

## **2.5 Jobs Fund Service**

- This service co-finances projects by the public, private and non-governmental organisations to contribute to job creation.
- Types of experts required: Supply Chain Management; Commercial, Corporate, Finance law; Project Financing; Socio Economic Assessment; Value Chain Analysis; Business Process Mapping and Re-engineering; Financial Investment Structuring; Grant Development Programme.
- Economic sectors in which these expert services are needed include: Agriculture; Industrialisation and exports; Innovation, science and technology.

## **2.6 Transaction Advisory Service and Public Private Partnership (TAS and PPP)**

- This unit provides assistance to Government Institutions in the planning, procurement and implementation of large-scale transactions for infrastructure and related services. It assists Departments and Organs of State in establishing appropriate transactional advisory support for large projects, and provides diverse advisory support for smaller transactions. It also provides support for major infrastructure procurement projects, Public Private Partnerships and service delivery improvement programmes, including project conception and registration, transaction process support, legal and financial advice. The key objective is to improve the quality of project outcomes by ensuring a link between the objectives of government and the ultimate contract. Transaction support involves transaction planning, feasibility analysis, procurement and institutionalization.

## **3 PURPOSE OF THIS REQUEST FOR BID**

GTAC seeks to establish a panel of professional service providers to support its operations. These terms of reference detail the specific skills and expertise required for selection onto the panel. Bid proposals will be accepted from both individuals (Sole Proprietors) and companies in a form of a registered entity.

### **3.1 GTAC Panel Utilisation**

The panel is used to source additional skills and capacity for specific projects on an “as and when” the specific needs arises. ***INCLUSION ON THE PANEL DOES NOT IMPLY A CONTRACT FOR WORK.***

**3.1.1** The selection of service providers from the panel is on a competitive basis.

- a. Specific terms of reference are developed for required services.
- b. Bidders who could be suitable for such work are identified from the panel based on the relevant expertise (as specified in their technical proposal).
- c. Proposals may include, amongst others, the proposed methodology and costing and will be evaluated against the criteria set out in the specific terms of reference.
- d. Proposals are evaluated, as per the criteria set out in the specific terms of reference, and GTAC reserves the right to hold interviews with prospective bidders as part of the evaluation process.
- e. The final evaluation on specific terms of reference includes Preferential Procurement Policy Framework Act (PPPFA).

## **4 NON-COMPULSORY BRIEFING SESSION**

A non-compulsory briefing session will be held to provide more information relating to this bid and its Terms of Reference. The session will also outline the processes including the electronic submission requirements. Bidders will have an opportunity to seek clarity based on the bid document. The questions and answer pack will be made available on the GTAC website for all bidders to access. Details of the briefing session are as follows:

**Date and time:** 01 November 2019 at 10h00 to 12h00.

**Venue:**

National Treasury  
40 Church Square  
Pretoria  
Budget Council Room

## 5 DURATION OF PANEL

The successful bidders will be appointed to the Panel for a period of thirty-six (36) months for each batch from date of appointment. There will be an option to extend periodically, at GTAC's discretion.

## 6 PROJECTED TIMELINES OF THE BID PROCESS

The validity period is 180 days after the closing date of the bid. The project timeframes of this bid are set out below:

Activity	Dates
Advertisement in the Government Gazette and National Treasury e-Tender Portal	18 October 2019
Bid documents availed on GTAC website	21 October 2019
Briefing session (Non-compulsory)	1 November 2019 at 10h00
Bidder clarifications	6 November 2019
Questions and answers uploaded onto the GTAC website	8 November 2019
Closing date and time of the bid	14 November 2019 at 11h00

*All times and dates in this Terms of Reference are South African Standard Time.*

## 7 CONTACT

Requests for clarification must be made in writing via e-mail to [psp@gtac.gov.za](mailto:psp@gtac.gov.za). Requests for clarification will be accepted by GTAC until 17:00 on 06 November 2019. The submission reference (GTAC 005-2019) must be included in the subject line of the e-mail.

Bidders must reduce all telephonic enquiries to writing and send to the abovementioned email address.

GTAC will respond to the requests by 8 November 2019. The clarifications and the frequently asked questions will be made available to all potential bidders by way of notification on the GTAC website:

<https://www.gtac.gov.za/tender-info/tenders/advertised-tenders>

## 8 GTAC PANEL APPROACH

The approach to the establishment of the GTAC panel, is to stagger the process in batches. Each batch will be issued in a separate Request for Bid. Each category within a batch will have its own evaluation criteria (*refer to Annexures A - D for the evaluation criteria of each category*).

This TOR includes the following categories for batch 1 and bidders need to indicate the category and related skills/expertise they are bidding for (**Appendix A**):

- **Actuarial Services**
- **Statistics and Data Analysis**
- **Financial Management**
- **Supply Chain Management**

**NB:** Pricing will not be applicable at this stage; Bidders will be appointed onto the panel based on reaching the minimum threshold for technical/functionality. Pricing will be applicable during subsequent procurement for specific projects at utilisation stage.

### 8.1 Bid Submission Requirements:

Bidders should ensure that the following submission requirements, which will be needed for evaluation purposes; are included in their bids:

- a. Bidder technical proposal cover page (template provided as **Appendix B**).
- b. A copy of the relevant tertiary qualification or equivalent from a recognized institution in line with your area of expertise (where applicable).
- c. Information in the CV of the Principal/Lead Advisor **per category** should include relevant experience in the chosen area of expertise demonstrating the required competency.
- d. Only **one (1)** CV per category will be evaluated, in the event that more are submitted, the first will be evaluated (CV template provided as **Appendix C**).
- e. Project reference specifying the role played by the bidder in the listed projects/assignments.
- f. Relevant Programmes/Projects completed or current by the bidder. Please see Template for "Programme / Project Profile" supported by a Letter of Reference please see "Contents of the Letter of Reference".
- g. Standard Bidding Documents (SBD 1, 2, 4, 6.1, 8 and 9).
- h. Tax compliance status requirements: Central Supplier Database (CSD) number/report.
- i. Copy of Identity documents of directors or shareholders of the company.

## 9 MANDATORY REQUIREMENTS

Failure to adhere to any of these requirements will result in disqualification:

- a. Any person who is employed by the state will not be considered.
- b. Failure to indicate which bid categories you are bidding for will result in disqualification.
- c. Non-submission of technical proposal will result in disqualification of the bidder.
- d. CV of the Principal/Lead Advisor per category should include relevant experience in the chosen area of expertise demonstrating the required competency. Failure to use the CV template *will result in disqualification of the bid*.



- e. False declaration and/or incomplete standard bidding documents (SBD) will lead to disqualification.
- f. Both electronic and hardcopy must be submitted, failure to submit both electronic and hardcopy bid proposal will result in disqualification of the bidder. **Electronic and hardcopy bid documents must be identical.**
- g. Compulsory requirement for Actuarial Services Category of Management Services: The Principal must belong to a recognised Actuarial Professional Body, with a fellowship status i.e. FASSA or equivalent. ***Failure to meet this requirement will result in disqualification***

## 10 EVALUATION AND SELECTION CRITERIA

GTAC has set minimum standards that bidders need to meet in order to be selected as a successful bidder. Minimum standards consist of the following:

- Administrative Compliance – Bidders must submit all Standard Bidding Documents (SBD), as outlined in paragraph 10.1 below. SBD documents must be completed in full and duly signed where required.
- Technical Evaluation – Bidder(s) must meet the threshold of 65% per category.

### 10.1 Administrative Compliance

During the administrative compliance phase, proposals will be pre-screened to determine compliance with tax matters, Central Supplier Database (CSD) registration, submission of complete and duly signed Standard Bidding Documents (SBD) and other requirements as indicated below:

Document to be submitted	Requirement	Non-submission may result in disqualification?
Signed hard copy proposal delivered to GTAC tender box before closing date and time	Non-submission of the hardcopy bid proposal will lead to disqualification.	YES
Online electronic submission of the bid proposal before closing date and time. <b><i>NB: The electronic version will take precedence in a case of any discrepancies.</i></b>	Non-submission of the online bid submission will lead to disqualification.	YES
Invitation to bid – SBD 1	Complete and sign the supplied pro forma document.	YES
Central Supplier Database (CSD) Registration Report or CSD Registration number	Bidders must register on Central Database System and submit the Report as confirmation of registration. The successful bidders will be expected to be registered on CSD at the closing date of the bid. In the event that the supplier is not registered on	YES

Document to be submitted	Requirement	Non-submission may result in disqualification?
	CSD, this will result in disqualification.	
Declaration of Interest – SBD 4	Complete and sign the supplied pro forma document.	YES
Preference Point Claim Form – SBD 6.1 and B-BBEE certificate or B-BBEE Affidavit	Complete and sign the supplied pro forma document.	NO
Declaration of bidder's past Supply Chain Management practices – SBD 8	Complete and sign the supplied pro forma document.	YES
Certificate of Independent bid Determination – SBD 9	Complete and sign the supplied pro forma document.	YES

## 10.2 Functionality Evaluation

- a. Only bidders that have met the requirements for administrative compliance will be evaluated for functionality.
- b. Bid proposals will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this section of the terms of reference. Bid proposals will be evaluated for functionality and only those who meet the minimum threshold of 65% per category will qualify to be placed onto the panel.
- c. Bidders will not rate themselves, but need to ensure that all information is supplied as required. The Bid Evaluation Committee (BEC) will evaluate and score all responsive bids submitted by the bidders.
- d. The panel members will individually perform the technical evaluation of the responses received in the company/entity technical proposal (**including technical proposal cover page, CV template which must indicate: List of project completed, experience and capabilities of principal/lead advisor**) against the criteria indicated in Annexures A – D.

## 10.3 Functionality Evaluation Criteria

The technical/functionality requirements are set out in the below Annexures:

- Annexure A – Bid Evaluation Criteria for Actuarial Category
- Annexure B – Bid Evaluation Criteria for Statistics and Data Analysis Category
- Annexure C – Bid Evaluation Criteria for Financial Management Category
- Annexure D – Bid Evaluation Criteria for Supply Chain Management Category

The bidders will be evaluated out of weighted scores of 100% per category. Bidders must obtain a minimum threshold of 65% in order to qualify for placement onto the panel.

Functionality	Maximum weight achievable per category (%)	Minimum threshold per category-weighted score (%)
Technical Evaluation	100%	65%

## 11 INSTRUCTIONS FOR COMPLETION AND SUBMISSION OF BID PROPOSALS

### 11.1 Content and packaging of the Bid Proposal

The hard copy bid proposal must be packed in an Arch Lever file as follows:

- Section 1 – All SBD documents, B-BBEE certificate/affidavit, CSD report and Identity documents of directors or shareholders of the company.
- Section 2 – Technical proposal.

	Title	Type	Purpose
<b>Section 1: Standard bidding documents and administrative compliance</b>			
1	SCM SBD 1 – Invitation to bid	pdf	To be printed, filled in by hand and signed.
2	SCM SBD 2 – Tax compliance status requirements: Central Supplier Database (CSD) number/report	pdf	To be submitted.
3	SCM SBD 4 – Declaration of interest	pdf	To be printed, filled in by hand and signed.
4	SCM SBD 6.1	pdf	To be printed, filled in by hand and signed.
5	SCM SBD 8 - Declaration of bidder's past supply chain management practices	pdf	To be printed, filled in by hand and signed.
6	SCM SBD 9 - Certificate of independent bid determination	pdf	To be printed, filled in by hand and signed.
7	Identity documents of directors or shareholders of the company.	pdf	To be submitted.
8	Category and related skills/expertise ( <b>Appendix A</b> )	pdf	To be submitted.
<b>Section 2: Technical proposal</b>			
9	Bidder's technical proposal cover page ( <b>Appendix B</b> )	pdf	To be submitted.
10	CV of the Principal/Lead Advisor ( <b>Appendix C</b> )	pdf	To be submitted.
11	Copies of qualifications	pdf	To be submitted.
12	Proof- Actuarial Professional Body, with a fellowship status i.e. FASSA or equivalent.	pdf	To be submitted.

### 11.2 Labelling of Bid

The bidder shall place the hardcopy bid proposal into a sealed envelope or package and must be clearly marked and addressed as follows:

<b>BID:</b>	<b>ESTABLISHMENT OF A GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) PANEL OF PROFESSIONAL SERVICE PROVIDERS FOR A PERIOD OF THREE (3) YEARS - BATCH 1</b>
<b>Bid Reference No:</b>	GTAC 005-2019
<b>Submission closing date:</b>	11:00
<b>Submission closing time:</b>	<b>14 November 2019</b>
<b>Name of Bidder:</b>	
<b>Contact number of Bidder:</b>	
<b>Address of Bidder:</b>	

### 11.3 Bid Submission address and contact Details

**Bid closing date and time: 14 November 2019 at 11h00**

Hardcopy submissions must be made to:

GTAC Tender Box  
National Treasury Building  
240 Madiba Street  
GTAC Offices, Floor 24, Reception Area

**The tender box is accessible between office hours (8h00:17h00)**

**NB: NOT IN THE NATIONAL TREASURY TENDER BOX AT THE TENDER INFORMATION CENTRE (TIC).**

Electronic submissions must be made online on the GTAC website:

<https://www.gtac.gov.za/tender-info/tenders/advertised-tenders>

***NB: The online submission will be accessible by latest end of business Friday, 25 October 2019.***

**No late submissions will be accepted.**

### 12 TAX COMPLIANCE STATUS

Tax compliance status verification issued by the South African Revenue Services (pin)/CSD number certifying that the taxes of the bidder are in order must be submitted at the closing date and time.

### 13 COMMUNICATION

Professional Services Procurement (PSP) within GTAC will communicate with bidders for, among others, where bid clarity is sought, to obtain information or to extend the validity period. Any communication either by facsimile, letter or electronic mail or any other form of correspondence to any government official, department or representative of a testing institution or a person acting in an advisory capacity for GTAC in respect of this bid between the closing date and the award of the bid by the bidder is prohibited.

## 14 ANNEXURE A: BID EVALUATION CRITERIA FOR ACTUARIAL CATEGORY

<b>A.1: Experience of Principal of the Organisation/Entity</b>	<b>Scoring values</b>	<b>Weight (%)</b>
10 years or more	5 = Excellent	<b>20</b>
At least 5 years, but less than 10 years	4 = Good	
At least 3 years, but less than 5 years	3 = Satisfactory	
At least 1 year, but less than 3 years	2 = Poor	
Less than a year	1 = Not Acceptable	
<b>A.2: Level of responsibility - Principal was lead actuary for projects</b>		
10 years or more	5 = Excellent	<b>20</b>
At least 5 years, but less than 10 years	4 = Good	
At least 3 years, but less than 5 years	3 = Satisfactory	
At least 1 year, but less than 3 years	2 = Poor	
Less than a year	1 = Not Acceptable	
<b>A.3: Relevant experience in Actuarial work - Experience in any of the following areas: Social Security Programmes, Health care related work, Retirement funds</b>		
10 years or more	5 = Excellent	<b>20</b>
At least 5 years, but less than 10 years	4 = Good	
At least 3 years, but less than 5 years	3 = Satisfactory	
At least 1 year, but less than 3 years	2 = Poor	
Less than a year	1 = Not Acceptable	
<b>B: Organisation/Entity</b>		
<b>B1: Profile - Organisation/Entity (Ownership) (Information to be verified with CSD information)</b>		
>51% and above	5 = Excellent	<b>10</b>
Between 30 and 50% Black owned	4 = Good	
30 % Black owned	3 = Satisfactory	
Between 10 and 30% Black owned	2 = Poor	
<10% Black Owned	1 = Not Acceptable	
<b>C: Experience of the Organisation/Entity - Please See "Contents of Company Profile"</b>		
<b>C1: Relevant Years of company/entity Experience.</b>		
At least 7 years	5 = Excellent	<b>10</b>
At least 5 years, but less than 7 years	4 = Good	
At least 2 years, but less than 5 years	3 = Satisfactory	
At least 1 year, but less than 2 years	2 = Poor	
Less than 1 year	1 = Not Acceptable	
<b>D: Projects Completed or Current by Organisation/Entity</b>		
<b>D1: Number of relevant projects completed</b>		
Performed actuarial work in at least 5 projects in Social Security Programmes, Health care or Retirement funds	5 = Excellent	<b>20</b>
Performed actuarial work in between 1 and 4 in Social Security Programmes, Health care or Retirement funds	4 = Good	
Performed actuarial work in at least 5 projects in areas other than Social Security Programmes, Health care and Retirement funds	3 = Satisfactory	
Performed actuarial work in at least 3, but less than 5 projects in areas other than Social Security Programmes, Health care and Retirement funds	2 = Poor	
Performed actuarial work in less than 3 projects in areas other than Social Security Programmes, Health care and Retirement funds	1 = Not Acceptable	
<b>Maximum points</b>		<b>100</b>
<b>Minimum Threshold</b>		<b>65%</b>
<b><i>Failure to meet this requirement will result in disqualification</i></b>		

**15 ANNEXURE B: BID EVALUATION CRITERIA FOR STATISTICS AND DATA ANALYSIS CATEGORY**

<b>A: Qualifications &amp; Experience of Principal of the Organisation/Entity; Industry/Sector Requirements - Please See "Contents of Company Profile"</b>		
<b>A1: Qualifications - Principal</b>	<b>Scoring values</b>	<b>Weight (%)</b>
Post Graduate Degrees: Honours, Masters, PhD Qualification (NQF 8, 9 & 10) with specialisation in Statistics, Mathematics, Applied Mathematics, or similar relevant subjects	5 = Excellent	<b>20</b>
Degree/BTech/National Diploma (NQF 7) majoring in Statistics, Mathematics, Applied Mathematics, or similar relevant subjects	4 = Good	
Diploma Advanced Certificate (NQF 6)	3= Satisfactory	
Higher Certificate (NQF 5)	2 = Poor	
National Certificate (NQF 4)	1=Not Acceptable	
<b>A.2: Work Experience - Principal</b>		
10 years or more	5 = Excellent	<b>20</b>
At least 5 years, but less than 10 years	4 = Good	
At least 3 years, but less than 5 years	3 = Satisfactory	
At least 1 year, but less than 3 years	2 = Poor	
Less than a year	1=Not Acceptable	
<b>B: Organisation/Entity</b>		
<b>B1: Profile - Organisation/Entity (Ownership) (Information to be verified with CSD information)</b>		
>51% and above	5 = Excellent	<b>10</b>
Between 30 and 50% Black owned	4 = Good	
30 % Black owned	3 = Satisfactory	
Between 10 and 30% Black owned	2 = Poor	
<10% Black Owned	1=Not Acceptable	
<b>C: Experience of the Organisation/Entity - Please See "Contents of Company Profile"</b>		
<b>C1: Relevant years of experience and knowledge in Data analysis or Statistics</b>		
10 years or more	5 = Excellent	<b>15</b>
At least 5 years, but less than 10 years	4 = Good	
At least 3 years, but less than 5 years	3 = Satisfactory	
At least 1 year, but less than 3 years	2 = Poor	
Less than a year	1=Not Acceptable	
<b>C2: Experience with statistical and or data analysis software used by the Organisation/Entity relevant to "Data Analysis and Statistics"</b>		
At least 5 years' experience in STATA, SAS, SPSS, Python, R, SQL or similar	5 = Excellent	<b>20</b>
At least 3 years, but less than 5 years' experience in STATA, SAS, SPSS, Python, R, SQL or similar	4 = Good	
At least 1 years, but less than 3 years' experience in STATA, SAS, SPSS, Python, R, SQL or similar	3 = Satisfactory	
At least 1 year, but less than 3 years' experience in STATA, SAS, SPSS, Python, R, SQL or similar	2 = Poor	
Less than 1 year experience in STATA, SAS, SPSS, Python, R, SQL or similar	1=Not Acceptable	
<b>D: Programmes / Projects Completed by Organisation/Entity in "Data analysis and Statistics" - Please see Template for "Programme / Project Profile" supported by a Letter of Reference please see "Contents of the Letter of Reference"</b>		
<b>D1: Number of Relevant Projects completed: Relevance to be determined by looking at objectives of and role of the Organisation/Entity on Project as per Template</b>		
At least 20 projects completed	5 = Excellent	<b>10</b>
At least 10, but less than 20 projects completed	4 = Good	

At least 5, but less than 10 projects completed	3 = Satisfactory	
4 projects completed	2 = Poor	
Less than 4 projects completed	1=Not Acceptable	
<b>D2: Rand value of statistical component of Relevant Projects completed: Relevance to be determined by looking at objectives of and role of the Organisation/Entity on Project as per Template</b>		
R1 million or more total for all projects completed	5 = Excellent	<b>10</b>
At least R500 000, but less than R1 million total for all projects completed	4 = Good	
At least R100 000, but less than R500 000 total for all projects completed	3 = Satisfactory	
Less than R50 000 but less than R100 000 total for all projects completed	2 = Poor	
Less than R50 000	1= Not acceptable	
<b>Maximum points</b>		<b>100</b>
<b>Minimum Threshold</b> <i>Failure to meet this requirement will result in disqualification</i>		<b>65%</b>

## 16 ANNEXURE C: BID EVALUATION CRITERIA FOR FINANCIAL MANAGEMENT CATEGORY

<b>A: Qualifications and Experience of Principal of the Organisation/Entity; and Industry/Sector Requirements - Please See "Contents of Company Profile"</b>		
<b>A1: Qualifications - Principal</b>	<b>Scoring values</b>	<b>Weight (%)</b>
Post Graduate Degrees: Honours, Masters, PHD Qualification (NQF 8, 9 & 10)	5 = Excellent	<b>20</b>
Degree/B-tech/National Diploma (NQF 7)	4 = Good	
Diploma Advanced Certificate (NQF 6)	3= Satisfactory	
Higher Certificate (NQF 5)	2 = Poor	
National Certificate (NQF 4)	1=Not Acceptable	
<b>A.2: Work Experience - Principal</b>		
11+ years	5 = Excellent	<b>20</b>
6+ to 10 years	4 = Good	
3+ to 6 years	3 = Satisfactory	
1+ to 3 years	2 = Poor	
Less than 1 year	1=Not Acceptable	
<b>B: Organisation/Entity</b>		
<b>B1: Profile - Organisation/Entity (Ownership) (Information to be verified with CSD information)</b>		
>51% and above	5 = Excellent	<b>10</b>
Between 30 and 50% Black owned	4 = Good	
30 % Black owned	3 = Satisfactory	
Between 10 and 30% Black owned	2 = Poor	
<10% Black Owned	1=Not Acceptable	
<b>Experience of the Organisation/Entity - Please See "Contents of Company Profile"</b>		
<b>B2: Relevant years of experience and knowledge in Financial Management</b>		
8+ years	5 = Excellent	<b>30</b>
6+ to 8 years	4 = Good	
4+ to 6 years	3 = Satisfactory	
2+ to 4 years	2 = Poor	
1 to 2 years	1=Not Acceptable	
<b>C: Programmes / Projects Completed by Organisation/Entity - Please see Template for "Programme / Project Profile" supported by a Letter of Reference please see "Contents of the Letter of Reference"</b>		
<b>C1: Number of Relevant Projects completed in Financial Management</b>		
7+ Programmes / Projects	5 = Excellent	<b>20</b>
6- 7 Programmes / Projects	4 = Good	
4 - 5 Programmes / Projects	3 = Satisfactory	
2 - 3 Programmes / Projects	2 = Poor	
1 Programmes / Projects	1=Not Acceptable	
<b>Maximum points</b>		<b>100</b>
<b>Minimum Threshold</b> <i>Failure to meet this requirement will result in disqualification</i>		<b>65%</b>



## 17 ANNEXURE D: BID EVALUATION CRITERIA FOR SUPPLY CHAIN MANAGEMENT CATEGORY

<b>A: Qualifications and Experience of Principal of the Organisation/Entity; and Industry/Sector Requirements - Please See "Contents of Company Profile"</b>		
<b>A1: Qualifications - Principal</b>	<b>Scoring values</b>	<b>Weight (%)</b>
Post Graduate Degrees: Honours, Masters, PHD Qualification (NQF 8, 9 & 10)	5 = Excellent	<b>20</b>
Degree/Btech/National Diploma (NQF 7)	4 = Good	
Diploma Advanced Certificate (NQF 6)	3= Satisfactory	
Higher Certificate (NQF 5)	2 = Poor	
National Certificate (NQF 4)	1=Not Acceptable	
<b>A.2: Work Experience - Principal</b>		
11+ years	5 = Excellent	<b>20</b>
6+ to 10 years	4 = Good	
3+ to 6 years	3 = Satisfactory	
1+ to 3 years	2 = Poor	
Less than 1 year	1=Not Acceptable	
<b>B: Organisation/Entity</b>		
<b>B1: Profile - Organisation/Entity (Ownership) (Information to be verified with CSD information)</b>		
>51% and above	5 = Excellent	<b>10</b>
Between 30 and 50% Black owned	4 = Good	
30 % Black owned	3 = Satisfactory	
Between 10 and 30% Black owned	2 = Poor	
<10% Black Owned	1=Not Acceptable	
<b>Experience of the Organisation/Entity - Please See "Contents of Company Profile"</b>		
<b>B2: Relevant years of experience and knowledge in Supply Chain Management</b>		
8+ years	5 = Excellent	<b>30</b>
6+ to 8 years	4 = Good	
4+ to 6 years	3 = Satisfactory	
2+ to 4 years	2 = Poor	
1 to 2 years	1=Not Acceptable	
<b>C: Programmes / Projects Completed by Organisation/Entity - Please see Template for "Programme / Project Profile" supported by a Letter of Reference please see "Contents of the Letter of Reference"</b>		
<b>C1: Number of Relevant Projects completed in Supply Chain Management</b>		
7+ Programmes / Projects	5 = Excellent	<b>20</b>
6- 7 Programmes / Projects	4 = Good	
4 - 5 Programmes / Projects	3 = Satisfactory	
2 - 3 Programmes / Projects	2 = Poor	
1 Programmes / Projects	1=Not Acceptable	
<b>Maximum points</b>		<b>100</b>
<b>Minimum Threshold</b> <i>Failure to meet this requirement will result in disqualification</i>		<b>65%</b>