

**CBE 3/2021: APPOINTMENT OF A  
SERVICE PROVIDER TO PROVIDE  
INFRASTRUCTURE-AS-A-SERVICE  
(24/7/365)**

**(Data-Centre Cloud Migration) for a  
period of 18 months**

## **1. Background to the CBE**

The Council for the Built Environment (CBE) is a statutory body established under the Council for the Built Environment Act (no. 43 of 2000). It is an overarching body that coordinates the six Professional Councils (Architecture, Engineering, Landscape Architecture, Project and Construction Management, Property Valuation and Quantity Surveying – all operating within the Built Environment) for the purpose of promoting good conduct within the Profession, transforming the professions, and advising Government on issues relating to the Built Environment. The CBE is a schedule 3(a) public entity and is subject to compliance with the Public Finance Management Act (PFMA) Act No. 29 of 1999 and Treasury regulations.

## **2. Background to the Assignment**

The CBE has developed an IT Strategy that focuses on improving how the business of the CBE is run. A roadmap of technological initiatives has been developed in line with the CBE business requirements and needs. One of the initiatives is the relocation / migration of the current physical data centre into a cloud data centre.

The CBE IT team investigated and assessed the IT trends regarding the managed infrastructure and cloud computing. It was identified that there is a lot of benefits about the services. The CBE prioritised the migration to cloud environment. The CBE has partially implemented some of the cloud services already.

The Infrastructure-as-a-Service is a managed and automated cloud offering whereby the computing resources (that includes the servers, storage, security, system management, monitoring capabilities) are owned, hosted, and managed by the service provider and provided to clients on demand. The services are easily scalable (add more resources easily).

### 3. Objective and Overview of the CBE Infrastructure

The objective of the assignment is to appoint a Service Provider to provide Infrastructure-as-a-Service. ***The CBE is moving into the 4<sup>th</sup> Industrial Revolution whereby our data centre and services are securely running on a cloud platform and can also be accessed anytime anywhere.*** The service provider must consider the following: Servers, Storage, Backup and security but not limited to these services.

The CBE is currently running its Data Centre services on-Premises with virtualized enabled environment – Hyper-V. The Data Centre is hosting the following:

#### 1. Infrastructure AS-IS

- **2 X Hosts (HP)**
  - 2 X Domain Controllers
  - Intranet
  - Active Directory
  - SQL – (Pastel)
  - File Server
  - Veeam Backups
  - iTop – Incident Management System (Linux)
  
- **Cloud Services**
  - Microsoft 365
  - Antivirus – Kaspersky Cloud
  
- **IT Security**
  - Antivirus – Kaspersky Cloud
  - MikroTik Firewall – ISP
  
- **Backup**
  - Veeam – Daily
  
- **Desktop Environment**
  - Desktop X 3
  - Laptops X 38

- **Licenses** – in the event that CBE still has the active licenses, the service provider can utilise them and if not, the service provider should allocate licensing.

#### 4. Scope of work and project deliverables

The scope of work and project deliverables are as follows:

Item No.	Scope of work	Deliverables
1	Provide Infrastructure-as-a-Service (24/7/365) for a period of 18 months  a. Provide & Implement Managed Cloud Infrastructure (Production & Storage) b. Migration of the Physical Server Services c. Skills Transfer to CBE Administrators d. Support and Maintenance – Infrastructure & Software e. The data storage location <b>must</b> be in South Africa	<ul style="list-style-type: none"> <li>• Bid Document with Pricing</li> <li>• SLA Support and Maintenance – Draft</li> <li>• Data Migration Plan</li> <li>• Training to be conducted</li> <li>• Proof of data storage location</li> </ul>

#### 5. Important Implementation Considerations

**5.1 Regulations** – The service provider must provide the following information:

- The Maturity level of the IaaS.
- The level of management to be done by the service provider and the level required to be done by the CBE.
- The security risks associated with the proposed cloud environment and how these will be mitigated.
- The regulations required to govern IaaS.
- Cost for shared IaaS environment.
- The management and monitoring tools that will be used.
- The level of control that the CBE will have on the cloud infrastructure and Data.
- The IaaS Implemented in South Africa

## 6. Project timeframes

The estimated timeline for completing the scope of work is 4 weeks from the date of signing the contract.

## 7. Evaluation Process:

After the closing date, the Bid Evaluation Committee will evaluate the bids received. The following evaluation process shall be followed:

### 7.1 **Pre-qualification Criteria: Bidders will be required to meet the following pre-qualification criteria. Failure to meet these requirements will result in the disqualification of your bid:**

- a) Potential service providers must be registered on the National Treasury Central Supplier Database (CSD). The CSD registration report must be submitted. Prospective bidders must be tax compliant. This bid will not be awarded to any bidder who is not registered on the CSD, whose tax matters are not in order and is a restricted supplier.
- b) Only B-BBEE Level 1 and 2 contributors must submit a response to this bid. A copy of a correct and valid B-BBEE certificate (only SANAS accredited certificates will be accepted) OR valid sworn affidavit (whichever is applicable) must be submitted to confirm your B-BBEE status. **Please take note of paragraph 7.2 (b) below.** Failure to submit a B-BBEE certificate or sworn affidavit will result in the disqualification of your bid. Failure to submit a correct and valid certificate or sworn affidavit will result in the disqualification of your bid. Any enquiries in respect of B-BBEE Status Level Verification Certificates may be directed to the B-BBEE Commission at 012-649 0918. Bidders must note that sworn affidavits must adhere to the requirements set out in The Broad Based Black Economic Empowerment Practice Guide 1 of 2018, Determining the validity of a Broad-based Black Economic Empowerment verification certificate, B-BBEE certificate and sworn affidavit, par 17 (attached). (Please ensure that your affidavit complies with the requirements set out under this paragraph. If one or more requirements are not met, it will render the affidavit invalid).

**Special note: Bidders must please ensure that affidavits indicate the title of the deponent i.e. director or member or owner (please**

**circle/underline the relevant title applicable to you); and the full financial year must be stated i.e. date, month and year (not only the calendar year). Please indicate whether the management accounts or financial statements were used in determining the total revenue.**

- c) The data storage must be in South Africa. Bidders must provide documentary evidence in support of this.

**\*\* The CBE reserves the right to verify the authenticity of the information. The results of the verification will take precedence.**

## 7.2 Evaluation Phases:

- Phase 1: Technical /Functionality Evaluation

The service provider’s bid will be evaluated against the set criteria indicated under paragraph 7.3 below. A form will be used which will reflect the name of the service provider, the different criteria, with space provided to record the points awarded and motivation for points awarded. The allocation of points will not be effected on a basis of consensus.

The following scoring matrix will be used:

Unable to evaluate	Does not comply with the requirements	Partially complies with the requirements	Fully complies with requirements	Exceeds requirements	Exceptionally exceeds requirements
0	1	2	3	4	5

The following formula will be used to convert the points scored against the weight:

$$Ps = \left( \frac{So}{Ms} \right) \times 100$$

Where:

- Ps = Percentage scored for functionality by bid under consideration
- So = Total score of bid under consideration
- Ms = Maximum possible score

Service providers will be expected to achieve a minimum threshold score of 60% in order to proceed further in the evaluation process.

A due diligence process will be conducted in respect of all short-listed bidders to determine the capability and ability of short-listed bidders to execute this contract. The CBE reserves the right to utilise any one or more of the below due diligence methods:

- presentation by bidders with pre-determined questions being posed by the CBE or
- an investigation by the CBE of the bidder's previous contracts carried out, availability of skills or knowledge, existing work load or
- confirmation of the authenticity and content of the reference letters submitted (bidders **must** provide a minimum of three dated and signed reference letters of the same/similar work undertaken within the last 5 years as per the Evaluation criteria below, even if this method is not selected for due diligence).

Should negative feedback be obtained from the aforementioned, that will render the bidder unsuitable to execute the assignment, their bid will be disregarded at this point and they will not proceed for further evaluation.

Should a presentation be required a set of pre-determined questions based on the submitted bid will be posed. This will be evaluated based on a grading scheme of either consistent or not consistent with the bid. Should more than 20% of the responses not be consistent to the bidder's bid their bid will be disregarded.

It must be noted that if a service provider has previously undertaken work for the CBE to which a positive report is on record, such report may be used for the purpose of due diligence in the event that the selected method(s) above is/are unsuccessful.

Should the bidder meet the requirements of due diligence, their bid will proceed to Phase 2.

- Phase 2: Calculation of points

Please note that the bids will be evaluated using the 80/20 preference point system where:

- (a) 80 points are allocated for price and 20 points are allocated for the service provider's B-BBEE Level of Contribution.
- (b) **Only the shortlisted bidders at this Phase will be requested to submit the original or originally certified copy (it must be fresh ink and not a copy) of the B-BBEE certificate OR valid original sworn affidavit (whichever is applicable) that was already submitted for pre-qualification purposes. Failure to submit the certificate or affidavit within the required timeframe will result in the disqualification of your bid.**

During phase 2, points for price will be calculated for all shortlisted service providers in accordance with the following formula:

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

Where:

- $P_s$  = Points scored for price of bid under consideration  
 $P_t$  = Rand value of bid under consideration  
 $P_{\min}$  = Rand value of lowest acceptable bid

- The final points will be calculated as follows:

Points for price:	80 points
B-BBEE Status Level of Contribution:	<u>20 points</u>
Final points:	<u>100 points</u>

In accordance with section 2(1)(f) of the Preferential Procurement Policy Framework Act, 2000, the CBE reserves the right to apply the following objective criterion, based on current case law, in determining the final outcome of the award irrespective of which bidder scores the highest final points:

- (1) the rotation of contracts amongst suppliers; following 2 awards by the CBE to the same supplier within a period of 12 months.”

A recommendation for award will then be formulated for approval by the relevant delegated authority.

### 7.3 Evaluation Criteria

The following criteria and weights shall apply when considering the bids:

CRITERIA FOR TECHNICAL SPECIFICATION	WEIGHT	SCORING GUIDELINE
<p><b>Experience relevant to assignment</b></p> <p>Provide detailed information on the background of the company in undertaking this type of project (Datacentre Cloud Migration)</p> <p>Provide a minimum of <b>three dated signed</b> referee letters of same or similar projects undertaken in the last five years.</p>	40	<p>No letters = 0            1 dated signed letter = 1            2 dated signed letters = 2            3 dated signed letters = 3            4 dated signed letters = 4            +5 dated signed letters = 5</p>
<p><b>Technical Specification and Functionality</b></p> <p>The service provider must provide a detailed:</p> <ul style="list-style-type: none"> <li>(a) Implementation Plan (specification and functionality, capacity, capability and security of their solution including the design and the technology to be used (Architecture) (15)</li> <li>(b) Migration Plan (10)</li> <li>(c) Draft Support and Maintenance (SLA) (15)</li> </ul>	40	<p>No information provided = 0            Unacceptable, does not meet set criteria = 1            Compliance with some of the technical requirements = 2            Meets the requirements in terms of understanding the product proposed and displaying the ability to implement the project = 3            Above average understanding of the product proposed and displaying the ability to</p>

		<p>implement the project = 4</p> <p>Meets and exceeds the expected level in terms of understanding the product proposed and displaying the ability to implement the project = 5</p>
<p><b>Skills Transfer to CBE Administrators</b></p> <p>Bidders must submit a detailed training plan.</p>	20	<p>0= no training plan provided</p> <p>1= Mention of training but no further details provided</p> <p>2= Training schedule provided with no details</p> <p>3= Detailed training plan provided</p> <p>4= Detailed training plan including training clips/manual</p> <p>5= Detailed training plan including training clips/manual &amp; any value added services</p>
<b>Total</b>	100	
<b>Threshold Score</b>	60	

## **Important Conditions**

- I. Protection of Personal Information - All bidders agree that personal information of persons related to or linked with bidders or respondents to this request for quotations/request for proposals or tender document is/may be required to fulfil the requirements for submitting a bid. All bidders agree that the CBE may collect, keep and process such information provided that the aforesaid uses shall be for purposes of evaluating the bid submitted. Where the information is sought to be used for other purposes, further and specific consent shall be obtained.
- II. Pricing (including Support and Maintenance for a period of 18 months) must be **firm**.
- III. Pricing must be firm, be inclusive of VAT (if VAT registered); and clearly outlined.
- IV. All Supply Chain Management compliant (required) documents must be completed in full and submitted. These include: SBD 1, 4, 6.1, 8 & 9.
- V. Any award made to a Bidder under this bid is conditional upon the Bidder accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which the CBE is prepared to enter into a contract with the successful Bidder.
- VI. The General Conditions of Contract (GCC) are to be acknowledged and returned with your bid.
- VII. Bidders must submit the company registration documents (CIPC), share certificate, financial information used in BBBEE affidavit and ID documents of all Directors.
- VIII. All parties forming a Joint Venture/Consortium for the purpose of this assignment must submit a separate CSD report for each party; and all SBD forms and GCC must be completed by each party to the Joint Venture/Consortium and submitted accordingly.
- IX. The CBE reserves the right to disregard a bidders' bid should it be found that work was previously undertaken for the entity to which poor performance was noted during the execution of such contract that subsequently lead to the cancellation of said contract in the last five years. Documentary evidence of poor performance without a cancellation of the contract may also result in the disqualification of the bidders' bid.
- X. Any communication between the closing date and the award of the bid by Bidders is discouraged.
- XI. Whilst all due care has been taken in connection with the preparation of this bid, the CBE makes no representations or warranties that the content of the bid or any information communicated to or provided to Bidders during the bidding process is, or will be, accurate,

current or complete. The CBE and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current or complete.

- XII. If a Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the CBE (other than minor clerical matters), the Bidder(s) must promptly notify the CBE in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the CBE an opportunity to consider what corrective action is necessary (if any).
- XIII. Any actual discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by the CBE will, if possible, be corrected and provided to all Bidders without attribution to the Bidder(s) who provided the written notice.
- XIV. Bidders' attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by Bidders or qualifying any Bid Conditions will result in the invalidation of such bids.
- XV. The CBE supports the spirit of broad based black economic empowerment and recognises that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background the CBE condemns any form of fronting.
- XVI. The CBE, in ensuring that Bidders conduct themselves in an honest manner may, as part of the evaluation process, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry / investigation, the onus will be on the Bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid / contract and may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies the CBE may have against the Bidder / contractor concerned.
- XVII. Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements (where applicable). The CBE will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.
- XVIII. The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

- XIX. A Bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid. In the event that the CBE allows a Bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the Bidder and the CBE will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.
- XX. Bidders who want to claim Preference points will have to comply fully with regulations 11(8) and 11(9) of the PPPFA Act with regard to sub-contracting.
- XXI. The following is an extract from the PPPFA Act:
- XXII. 11(8) "A person must not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub- contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a counter
- XXIII. (EME) that has the capability and ability to execute the sub-contract."
- XXIV. 11(9) "A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract."
- XXV. If a Bidder breaches the conditions of this bid and, as a result of that breach, the CBE incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the Bidder indemnifies and holds the CBE harmless from any and all such costs which the CBE may incur and for any damages or losses the CBE may suffer.
- XXVI. Bids must be emailed to [sthembile@cbe.org.za](mailto:sthembile@cbe.org.za). The Bidder(s) are required to submit their technical and pricing proposal as two separate files/attachments.**
- XXVII. The original or originally certified BBEE Certificates or original sworn affidavits of the shortlisted bidders during Phase 2 of the evaluation process must be hand delivered to 169 Corobay Avenue, Corobay Corner (Block A – 2nd Floor), Menlyn, Pretoria and deposited into the bid box when requested to do so by the CBE SCM unit.
- XXVIII. It is the responsibility of prospective bidders to ensure that their bid documents are submitted before the closing date and time of the bid.
- XXIX. Bids received after the closing time and date will not be considered for evaluation.
- XXX. The CBE reserves the right not to award this contract.
- XXXI. Any change of information provided in the bid document that may affect delivery by the successful bidder must be brought to CBE's attention as soon as possible. Failure to comply may result in the contract being terminated.

- XXXII. The CBE will enter into a formal contract with the successful bidder.
- XXXIII. It must be noted that payment will be made upon satisfactory delivery of the service and receipt of an invoice.
- XXXIV. The invoice will be paid within 30 days of receipt thereof. No deposit and advance payments will be made. A shorter payment period may be agreed upon by the CBE and the successful supplier and a supplier development agreement will be signed in this regard. To be considered for the shorter payment period the service provider must meet the following requirements:
- Be at least 51% black owned.
  - Be an Exempt Micro Enterprise (EME) (Turnover under R10 million) or a Qualifying Small Enterprise (QSE) (Turnover less than R50 million), subject to the specific Sector Code.
- XXXV. Should the bidder present information intentionally incorrectly/fraudulently they will be disqualified.
- XXXVI. The closing date for submission of bids is **15 December 2021 at 11:00am**.

Written enquiries

(all enquiries must be addressed in writing to the following officials):

Supply Chain Management:  
Acting Procurement Specialist  
Ms Sthembile Madonsela  
Tel: 012 346 3985  
Email: [sthembile@cbe.org.za](mailto:sthembile@cbe.org.za)

Technical:  
Manager: Knowledge Management and Information  
Technology  
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