ANNEXURE "H"

Companies and Intellectual Property Commission
a member of the dtic group

TERMS OF REFERENCE ("TOR")

CIPC BID NUMBER: 08-2025-2026

DESCRIPTION: INVITATION TO SERVICE PROVIDERS TO SUBMIT PROPOSALS FOR ENTERPRISE DATA MANAGEMENT AND GOVERNANCE SOLUTION AND SUPPORT

CONTRACT PERIOD: FIVE (5) YEARS

BID CLOSING DATE: 03 DECEMBER 2025

COMPULSORY BRIEFING SESSION: 17 NOVEMBER 2025

NB: IT IS THE RESPONSIBILITY OF THE PROSPECTIVE BIDDERS TO DEPOSIT TENDERS IN THE CORRECT BOX AND TENDERS DEPOSITED IN WRONG BOXES WILL NOT BE CONSIDERED.

THE CIPC TENDER BOX HAS THE FOLLOWING DESCRIPTION: "CIPC TENDER BOX" SITUATED AT THE DTIC MAIN GATE

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1. TERMS AND CONDITIONS OF REQUEST FOR TENDER (RFT)

1. CIPC's standard conditions of purchase shall apply.
2. Late and incomplete submissions will not be accepted.
3. Any bidder who has reasons to believe that the RFP specification is based on a specific brand must inform CIPC before BID closing date.
4. Bidders are required to submit an original Tax Clearance Certificate for all price quotations exceeding the value of R30 000 (VAT included). Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of this RFP. Certified copies of the Tax Clearance Certificate will not be acceptable.
5. No services must be rendered, or goods delivered before an official CIPC Purchase Order form has been received.
6. This RFP will be evaluated in terms of the **80/20** system prescribed by the Preferential Procurement Regulations, 2001.
7. The bidder must provide assurance/guarantee to the integrity and save keeping of the information (that it will not amended/corrupted/distributed/permanently stored/copied by the service provider) for the duration of the contract and thereafter. Failure to submit will invalidate the bid proposal.
8. CIPC reserves the right to negotiate with the successful bidder on price.
9. The service provider must ensure that their work is confined to the scope as defined.
10. Travel between the consultant's home, place of work to the DTIC (CIPC) vice versa will not be for the account of this organization, including any other disbursements.
11. The Government Procurement General Conditions of contractors (GCC) will apply in all instances.
12. As the commencement of this project is of critical importance, it is imperative that the services provided by the Service Provider are available immediately. Failing to commence with this project immediately from date of notification by CIPC would invalidate the prospective Service Provider's proposal.
13. No advance payment(s) will be made. CIPC will pay within the prescribed period as per the PFMA.
14. **All prices quoted must be inclusive of Value Added Tax (VAT)**
15. **All prices must be quoted in South African Rand**
16. **All prices must be valid for 120 days**
17. The successful Service Provider must at all times comply with CIPC's policies and procedures as well as maintain a high level of confidentiality of information.
18. All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner or his/her delegate.
19. The successful bidder must ensure that the information provided by CIPC during the contract period is not transferred/copied/corrupted/amended in whole or in part by or on behalf of another party.

20. Further, the successful bidder may not keep the provided information by way of storing/copy/transferring of such information internally or to another party in whole or part relating to companies and/or close corporation. As such all information, documents, programs and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner or his delegate.
21. The service provider will therefore be required to sign a declaration of secrecy with CIPC. At the end of the contract period or termination of the contract, all information provided by CIPC will become the property of CIPC and the service provider may not keep any copy /store/reproduce/sell/distribute the whole or any part of the information provided by CIPC unless authorized in terms of the declaration of secrecy.
22. The Service Provider is restricted to the time frames as agreed with CIPC for the various phases that will be agreed to on signing of the Service Level Agreement.
23. CIPC will enter into Service Level Agreement with the successful Service Provider.
24. **CIPC reserves the right not to award this bid to any prospective bidder or to split the award.**
25. **Fraud and Corruption:**

The Service Provider selected through this Terms of Reference must observe the highest standards of ethics during the performance and execution of such contract. In pursuance of this policy, CIPC Defines, that for such purposes, the terms set forth will be as follows:

i. "Corrupt practice" means the offering, giving, receiving or soliciting of anything of value to influence the action of CIPC or any personnel of Service Provider(s) in contract executions.
ii. "Fraudulent practice" means a misrepresentation of facts, in order to influence a procurement process or the execution of a contract, to CIPC, and includes collusive practice among bidders (prior to or after Proposal submission) designed to establish Proposal prices at artificially high or non-competitive levels and to deprive CIPC of the benefits of free and open competition;
iii. “Unfair trade practices” means supply of services different from what is ordered on, or change in the scope of work;
iv. ” Coercive practices” means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the execution of contract;
v. CIPC shall reject a proposal for award, if it determines that the bidder recommended for award, has been engaged in corrupt, fraudulent or unfair trade practices;
vi. **CIPC also reserves the right to terminate this Agreement by giving 10 (ten) business days written notice to the service provider due to any perceived (by CIPC) undue reputational risk to CIPC which CIPC can be exposed to resulting from the service provider or its management/directors being found to be involved in unethical behaviour, whether in its dealings with CIPC or any other business dealings.**
Note: “Unethical behaviour” includes but not limited to an action that falls outside of what is considered morally right or proper for a person, a profession or an industry

vii. CIPC shall declare a Service Provider ineligible, either indefinitely or for a stated period of time, for awarding the contract, if at any time it determines that the Service Provider has been engaged in corrupt, fraudulent and unfair trade practice including but not limited to the above in competing for, or in executing, the contract.

viii. The service provider will sign a confidentiality agreement regarding the protection of CIPC information that is not in the public domain.

26. The successful bidder, which includes active company directors and resources assigned/deployed to the project, will undergo a security screening process. The appointment is contingent upon the positive results of this security screening. **If any serious negative information arises during this process, the CIPC reserves the right to request the bidder to remedy the situation within a specified period, and/or if not possible, the CIPC may withdraw the award.**

27. Occupational Health and Safety Obligations

i. CIPC is committed to ensure a safe work environment, imposing protection towards the health and safety of all personnel and preventing workplace injuries or losses. Mandataries/ service providers are employers, with duties prescribed in the Occupational Health and Safety Act No. 85 of 1993 as amended and other legislative obligations. Mandataries/ service providers shall strictly adhere to and ensure that their personnel adhere to the provisions of the OHS Act 85 of 1993 inclusive of required OHS obligations (CIPC OHS requirements and all other applicable legislation). The awarded service provider is required to provide assurance by submitting the necessary and/or obligated Occupational Health and Safety requirements to CIPC.

ii. The necessary and/or obligated Occupational Health and Safety requirements include:

- Bidding Companies valid COIDA Letter of Good Standing, or a licensed compensation insurer.
- Bidding Companies signed Health; Safety & Environmental Policy Signed by Bidder's CEO OHS Act Section 16(1).
- The Acceptance of Occupational Health and Safety Legislative Obligations and Other Requirements.

  Upon Award, the following OHS Obligations shall be applicable but are not limited to:
- The Occupational Health and Safety Act 85 of 1993 Section 37(2) Agreement
- Other Occupational Health & Safety requirements (OHS file) compliance specific to the scope.

2. ***COMPLUSORY BID REQUIREMENTS (FAILURE TO COMPLY WITH ALL REQUIREMENTS BELOW WILL IMMEDIATELY DISQUALIFY THE PROPOSAL***

INSTRUCTIONS FOR THE SUBMISSIONS OF A PROPOSALS

SUBMISSION OF ORIGINAL HARD COPY

a) Bidder's must submit **One (1) original copy (hard printed copy of the technical proposal), this is for record keeping purposes and the USB Only will be used for bids evaluation.**

b) The bid document must be marked with the bidder's name

c) The bid documents ***must be signed*** by an authorized employee, agent or representative of the bidder and each and every page of the proposal shall contain the initials of same signatories

d) All pages of the submitted proposal must be numbered.

SUBMISSION OF USB

a) NO DISC WILL BE ALLOWED

b) **ONE (1) USB *must be submitted, including technical proposal as well as price proposal saved in separate folders;***

c) The USB must be marked with the bidder's name.

d) **The USB must have an index page/ table of contents listed all documents included in the proposal for easy referencing during evaluation (group information in separate folders)**

e) Open each folder prior submission to ensure that documents are saved and are properly opening and working

f) BIDDERS TO VERIFY IF DOCUMENTS ARE SUCCESSFULLY LOADED IN THEIR USB'S

g) USB'S WITH NO DOCUMENTS INCLUDED WILL BE DISQUALIFIED AS ONLY USB'S ARE USED FOR EVALUATION PURPOSES

h) ***Important***: The USB will be used for evaluation purposes up to tender award, so all documents must be included in the USB, including SBD forms, technical proposal mandatory documents etc.

i) The **USB** must contain the ***exact*** documents/ information submitted in the original copy which is only for record keeping

j) Bidders to ensure that the information is properly saved in the USB prior submitting to CIPC and that there are n***o missing pages, USB sticks opens, readable, and contain no blank pages, documents, or folder***s. ***Ensure that each folder created is numbered or documents placed in numbering order, avoid clustering folders with a lot of documents rather create separate folders***

k) THE USB WILL BE USED FOR EVALUATION HENCE THE BIDDER IS REQUIRED TO ENSURE THAT THE USB CONTAINS ALL INFORMATION.

l) CIPC WILL NOT BE HELD LIABLE FOR INCOMPLETE PROPOSALS/ INFORMATION SUBMITTED IN THE USB'S

m) All pages must be signed, numbered and initial as per the original copy

n) The USB must be submitted in **PDF format ONLY and must be *read ONLY, NO Passwords Protection***

o) BIDDERS TO ENSURE THAT USB'S ARE WORKING PRIOR SUBMISSION

p) Bidders to ensure that USB 's are not password protected

q) IT IS THE BIDDER'S RESPONSIBILITY TO VERIFY IF THE USB IS WORKING BEFORE SUBMISSION

r) BIDDER'S WITH USB'S NOT OPENING OR PASSWORD PROTECTED WILL BE DISQUALIFIED

FAILURE TO COMPLY WITH ALL THE ABOVE MENTIONED REQUIREMENTS WILL IMMEDIATELY INVALIDATE THE BID.

3. SUBMISSION OF PRICE PROPOSAL

a) Prospective bidders must submit a printed hard copy of the price proposal in a separate ***SEALED*** envelope. It is important to separate price from the technical proposal as price is evaluated at the last phase of the evaluation.

b) The price envelop must be marked with the bidder's name

c) **Bidders to complete pricing schedule SBD 3.3 (Annexure "C")- *REFER TO ATTACHED SBD FORMS***

d) **The total price** (***ceiling price)*** must be carried over to **BOTH SBD 3.3 (Pricing Schedule) and SBD FORM 1**: (Invitation for Bids). ***AND COMPLIANCE TO "ANNEXURE I" PAGE 42 to47***

e) The total bid Amount will be used for the evaluation of bids therefore it must be inclusive of all costs for the duration of the contract.

f) All prices must be VAT inclusive and quoted in South African Rand (ZAR). ***Failure to comply with this requirement will disqualify the bid.***

g) All prices must be valid for 120 days

PLEASE NOTE THAT IT IS COMPULSORY THAT BIDDERS SUBMIT PROPOSAL AS PER THE FOLLOWING

Companies and Intellectual Property Commission

1. **1 (ONE) ORIGINAL / HARD COPY PRINTED**
2. **1 (ONE) USB FOR TECHNICAL PROPOSAL AND PRICE MUST BE INCLUDED IN THE SAME USB BUT SAVED IN A SEPARATE FOLDER ("MARKED PRICE PROPOSAL") BIDDERS TO ENSURE THAT USB'S ARE WORKING PRIOR SUBMISSION**
3. **ONE SEALED ENVELOPE FOR PRICE PROPOSAL (INSIDE THERE MUST BE)**

- PRICE SCHEDULE – SBD.33: **PLEASE TAKE NOTE OF THE CLAUSE IN SBD 3.3 AND ENSURE COMPLIANCE**
- **ALL CONDITIONS OF PRICE FOR EXAMPLE- PRICE FLUCTUATIONS OR PRICES NOT FIRM DUE TO ROE, ETC MUST BE CLEARLY STATED IN SBD 3.3 IN THE SPACE PROVIDED. SEE PAGE 14**
- SBD1 - INVITATION TO BIDS
- PRICE BREAKDOWN PREFERABLE IN THE BIDDER'S LETTERHEAD SIGNED BY AN AUTHORISED REPRESENTATIVE

Note: The following annexures are included in this TOR

1. Annexure "I": Pricing Schedule – refer to guidelines for submission
2. Annexure "J": Security and Privacy Maturity Questionnaire
3. Annexure "K": Functional & Technical Requirements

NB: Bidders must also refer to page 26 of 61 of the Terms of reference under Mandatory Requirements

FAILURE TO COMPLY WITH ALL THE ABOVE MENTIONED REQUIREMENTS WILL IMMEDIATELY INVALIDATE THE BID.

I, the undersigned (NAME)……certify that:

I have read and understood the conditions of this tender.

I have supplied the required information and the information submitted as part of this tender is true and correct.

…….. ……..

Signature **Date**

FAILURE TO COMPLY WITH ALL THE ABOVE MENTIONED REQUIREMENTS WILL IMMEDIATELY INVALIDATE THE BID.

1. PURPOSE

The Companies and Intellectual Property Commission (CIPC), Business Intelligence Systems Group (BISG) Department, invites qualified bidders for the implementation of an Enterprise Data Management and Governance (EDMG) solution, including ongoing maintenance and support services, to continue our journey towards a data-driven organization, where all departments and partnerships realize the true potential of data. The Commission has identified two key outputs of this project:

- Configuration and implementation of a hybrid EDMG solution, strategically combining commercial off-the-shelf (COTS) software components with cloud-based capabilities, to effectively manage and govern data assets throughout their lifecycle, including discovery/catalog, data lineage, automated data quality profile and assessments / Master Data Management, and data governance workflow and framework support.

- Ongoing support services to ensure that the solution remains secure, integrated with required systems and applications, up-to-date, and optimized to continue to support the CIPC's needs.

2. BACKGROUND

In compliance with the Companies Act 2008, CIPC must provide the following services:

- Registration of corporate entities and intellectual property rights;
- Maintenance of accurate, up-to-date and relevant information concerning companies, corporate entities and intellectual property rights, and the provision of that information to the public and to other organs of state;
- The promotion of education and awareness of company and intellectual property laws, and related matters;
- The promotion of compliance with the Companies Act, and any other applicable legislation;
- Widest possible enforcement of the Companies Act;
- Promotion of the reliability of financial statements by monitoring compliance;
- Promoting voluntary resolution of disputes arising in terms of the Companies Act; and
- Research and reporting on matters of national policy and intellectual property law.

The primary objectives of this EDMG project are to enhance data quality, improve data accessibility, ensure regulatory compliance, and foster a data-driven culture across the organization.

3. SCOPE OF WORK

3.1 Background and Current State Overview

CIPCs rely on data for informed decision making and delivering services to their internal and external customers. In recent years, data analytics and technology innovations have expanded, and new sources and formats of data are required to meet customer demands. The successful launch of the CIPC's online platforms in the last 10 years created the need for data integration are recent examples of the CIPC's data-driven focus and reinforce the need to adopt a formal approach to managing and governing data. CIPC provides a wide array of information and services to citizens, businesses, and partners through 36 internal, yet independent departments. Each department interacts with various systems and applications (hosted) to serve internal and external customers. As a result, the CIPC has a diverse set of structured and unstructured data assets that are consumed by internal, external, and public users.

Technologies associated with CIPC data assets include but are not limited to the following:

- database management systems (e.g. Informix, Oracle & SQL Server).
- procedural and scripting code (e.g. SQL, PLSQL).
- BI/reporting environments (e.g., Power BI, SAP Business Objects (Crystal Reports)).
- cloud environments (e.g., Azure API Management, Data Lakehouse etc.).
- applications (e.g., Eservices, K2, Bizportal Portal, Customer Care and Billing, SAGE 300 People, ETC).

A. Internal Data

The Business Intelligence Systems Group (BISG) Enterprise Information Management Division has responsibility for the database management of hosted applications. While not exhaustive, BISG manages Informix database containing thousands of tables with 8 million +, 7 Oracle databases with over 280 schemas, SQL Server Cluster databases containing thousands of tables and 1+ million data fields or elements. Additionally, BISG Enterprise Information management unit manages Companies Information and Intellectual Property (i.e. Trademarks, Copyright, Patents and Designs) Systems databases and applications hosted on the on-premises IPOnline, eServices, BizPortal, Annual Returns, BO Disclosure & K2 Online and other internal system, these respective systems are associated with over 24,000 objects (18.6K, 2.5K and 3.4K) in our production environment alone. Test and staging environments each contain larger volumes due to development work. Within the CIPC, there is a diversity of data practices used within and across departments. Within departments, data owners and data stewards have been identified and subject-matter-experts participate in the development of applications to support program objectives. There are a number-of data related standards, security policies, and Administrative Regulations (AR) that have been developed. Additional tools, automated programs, and standards guidance will be essential to improve the goal of data democracy across the CIPC. There is a continuous effort through projects, user group meetings, training, and discussions to inform departments about standards and promote their adoption. The Data team has developed a strong process to document business requirements, develop technical requirements, create the information products, and document support plans. A few automated reporting programs have been configured to

enable monitoring at the infrastructure and application levels. Finally, BISG manages enterprise business intelligence and data integration for the organization. The tools within this framework enable staging from a wide array of sources (flat files, DBMS, APIs, etc.) and enrichment to an enterprise data warehouse for downstream use in reports and dashboards for presentation to a variety of users. While limited metadata capture is performed as part of initial Business Intelligence project documentation, the results are not centralized and easily searchable. Further, any changes to the data assets after the dashboard is delivered are not captured. Collectively, these systems are associated with over 10,000 data assets (tables and objects) in our production environment alone. Test and staging environments each contain larger volumes due to development work.

B. External Data

Agencies and partners external to the CIPC provide interfaces directly to both hosted applications and ingestion into a data integration process such as to the enterprise data warehouse for reporting. Currently there is no centralized inventory of these external data assets nor is the data lineage, sensitivity, or quality known. As a result, there is little visibility into these assets and inability to perform impact and risk analysis when issues arise such as unexpected values, timing, or structural changes.

C. Public Data

CIPC is in the process to implement a modernized open data portal to give data users an easy way to find and interact with CIPC datasets. The portal will host over 124 datasets and is growing. The BISG Enterprise information Management (EIM) team also manages a data disclosure portal for companies, cooperatives and intellectual property data and applications where public access to and data is available through BizPortal, IPOnline & eServices portal. The CIPC currently is in the process to build a data Lakehouse to effectively manages its datasets through a unified platform.

D. Challenges

Currently the CIPC does not have an EDMG solution in place. The lack of an enterprise data management and governance solution has led to difficulty knowing what data the CIPC has, the nature/sensitivity of the data, the data quality, how it's being used, who is using it, why it's needed, and whether it is trustworthy for reporting and other uses. Requests for new analytics initiatives are often challenging in the early stages of data discovery given there is no ability to search for data assets matching business criteria. A large amount of time goes into identifying and vetting potential data sources before any data integration work can begin.

3.2 Project Objectives

The primary objectives of this EDMG project are to enhance data quality, improve data accessibility, ensure regulatory compliance, and foster a data-driven culture across the organization. The output of this project includes two key components:

a. Installation, configuration, testing, and implementation of a new EDMG solution: the delivered solution must meet or exceed the functionality described in the CIPC's "Future State Vision" and meet the required CIPC Core Use Cases (CCUC) below.
b. Provide support services: Ongoing support services are required to ensure that the EDMG solution continues to stay secure, current, and meets or exceeds the ever- increasing needs of the CIPC's audience.

3.3 Future State Vision

The CIPC is seeking an EDMG solution that will provide an enabling framework to manage and protect our data assets to bring high-quality, trusted, secure, and discoverable data to authorized users, to promote responsible and ethical use and to empower decision makers with complete and reliable information. The delivered EDMG data catalog component must support:

A. Functionality/Capability

1. Data Discovery /Catalog

A core required function of the future EDMG solution is a data catalog component that automatically finds, harvests, catalogs, and curates all the CIPC's data asset metadata into an enterprise metadata catalog for ease of search. The delivered component must deliver the following:

a. Provides unlimited metadata ingestion through plug-n-play connectors, extensions, open API, and SDK framework along with a suite of file import templates.
b. Provides insights into data uses such as reporting and/or metrics.
c. Provides customizable dashboard views.
d. Provides drill downs into key data catalog attributes such as sensitive data, top data sources, data lineage and operational elements.
e. Provides the currency of data or date when it was last updated/modified.
f. Provides ability to store and display data owners per data asset.
g. Provides a display of CIPC users with access to the data assets and the last date of access.
h. Provides impact assessment for data changes (type, length, name, etc).
i. Provides ability to flag data fit for public release.
j. Provides a semantic layer.
k. Provides ability to flag reference/master data codes enterprise wide and by business domains.
l. Provides data certification tags/management.
m. Provides auto detection of sensitive data (PII, PHI and PCI) and recommend actions, risk ratings, and enables data elements to be manually classified or flagged as sensitive.
n. Provides data insights by leveraging machine learning (ML), artificial intelligence (AI), and natural language processing (NLP).

2. Data lineage

The EDMG solution shall support the native generation of data lineage for any data asset field / column from the source system all the way to the final target regardless of the target technology (database table, application, dashboard, etc.). The delivered EDMG data lineage component must support:

a. Provides interactive and drillable lineage diagram that provides optics at the component and object levels for risk and impact assessments for changes.

b. Provides Intuitive search capability for each data element (column).

c. Provides depiction and diagram data lineage from source to reporting layers, including all transformations in an easy-to-understand interface for both the business and technical perspectives.

d. Provides easy-to-understand pre-built views/reports of all potential upstream or downstream impacts of a change at a column, table or report level.

3. Automated Data Quality Profile and Assessments / Master Data Management

To streamline data curation, the CIPC requires a scalable EDMG solution scheduler to automatically profile and assess data quality of all data assets (dataset, table and/or field level) based on configurable rules. The delivered component must support:

a. Provides data profiling and data assessments with details and metrics alongside metadata details for easy visibility and understanding.

b. Provides auto generation of suggested data quality rules and assessment algorithms. This functionality is needed as an input into future data prioritization and governance workflows such as certifying data for public and/or internal use.

c. Provides ability to cleanse, match, link, identify, and reconcile master data in different data sources to create and maintain the "golden record".

d. Stores and distributes reference data created externally. Examples of reference data: county, currency, codes, regions, etc.

e. Manages different types of master data (person, product, etc.) inside the same platform.

f. Creates and maintains hierarchical constructs/models used by the business to aggregate information for reporting and analytics.

g. Manages relationships across entity instances within the same entity class, as well as across entity classes.

h. Identifies records in a dataset that refer to the same entity across different data sources.

i. Resolves duplicate representation of the same entity instance based on a set of defined attribute/rules and assign unique identifier for each instance.

j. Enables data stewards to monitor data quality and recommend and track remediation actions.

4. Data Governance Workflow and Framework Support

To support the CIPC's data governance framework and practices, the future EDMG solution must support:

a. Provides enrichment of the data catalog with a business glossary (definition of data assets in business terms), creation, configuration and attachment of relevant policies, standards, regulations, and other data governance rules
b. Finds and classifies sensitive data (Personally Identifiable Information (PII), Protection of Personal Information Act (POPIA), and Payment Card Industry Data Security Standard (PCI), among others). Leveraging AI and ML to speed deployment.
c. Audits and monitors data assets in real-time, for data governance compliance through rules-based configuration. Pre-built data governance audit/compliance risk-reduction workflows that highlight the distribution of data are highly desired.
d. Automates data security monitoring of sensitive data showing usage and permissions heatmaps to identify data and systems that are at risk of security exposure. Enable the configuration of alerts to data owners based on risk criteria.
e. Enables automated workflows to capture issues/needs, actions, and resolution at the data asset level to streamline data governance tasks such as data access or sharing requests, open data release, compliance audits, and policy changes.
f. Tracks data access and changes.
g. Automates version management and change control. Version all metadata and related mappings and provide change comparison reports to support audits and impact analysis.
h. Classifies generative AI and ML data outputs and manage related model inputs and outputs.
i. Provides auto-glossary suggestions to reduce manual work of linking glossary terms to each data table.
j. Provides ability to collaborate with stakeholders involved in governance activities using embedded integration with collaboration tools to make metadata accessible in native workflows and tools.

3.4 Weekly Status Report Requirements

1. **Develop and agree on a weekly status report format. The status report must be provided using a quad sheet format presentation, which, at a minimum, includes the following:**

- Task progress tracking against milestones.
- Billing Status
- Issues and concerns and a health monitor associated with the Scope of Work timeline and budget.
- Meeting agendas and minutes will be taken and provided.
- Status reports can be shared using a shared site, SharePoint, or emailed to the CIPCs project manager.

3.5 Staffing Requirements

A. The Bidder shall provide a project team that is knowledgeable, experienced, and has the skills necessary to ensure the success of all phases outlined herein.

1. Overall staffing levels must be sufficient to meet or exceed quality and timeline expectations, and key project personnel must have subject matter expertise in enterprise data management solutions and prior implementation experience on projects similar in scope. Please provide resumes for all project staff.
2. The Contractor will be expected to participate in day-to-day activities remotely unless otherwise requested by the CIPC.

- Offshore Work Performance: Any services that are described in the specifications or scope of work that directly serve the CIPC or its customers and involve access to secure or sensitive data or personal client data shall be performed within the defined territories of the Republic of South Africa. Unless specifically stated otherwise in the specifications, this paragraph does not apply to indirect or 'overhead' services, redundant back-up services or services that are incidental to the performance of the contract. This provision applies to work performed by subcontractors at all tiers.

1. Assume full responsibility for the successful implementation of the new EDMG Solution, ensuring it is completed on time and within budget, especially when choosing to engage subcontractors during the project, and meeting the project's objectives.
2. Experience completing at least 2, similar size projects that demonstrate their expertise, experience, and ability to deliver upon the minimum deliverable requirements specified for each phase in this scope of work.
3. Provide a Project Manager (PM), with experience in similar projects, who will serve as a single point of contact who will leverage industry best project management tools and methodologies in order to ensure product quality and timeliness for the duration of the project.
   - It is preferred that the PM has a project management certification, such as Project Management Professional or equivalent.
1. Accommodate working the CIPC working hours and be available from 7:30am – 5pm. Additional availability may be necessary as agreed upon by the CIPC and the Bidder.
2. Any EDMG Project-related meetings and time commitments shall occur during normal working hours (30am-5pm) unless there are special circumstances for meetings or other project-related time commitments to occur off hours. Bidder's working hours must expand outside of normal working hours as required during periods of implementation, go-lives, and heightened post-implementation support periods.

3.6 General Technology Requirements

a. **Data Connectivity and Integration:** The EDMG solution must enable seamless connectivity and data integration across all identified data sources, supporting both real-time and batch processing.
b. **Scalability and Performance**: The solution must be capable of scaling to accommodate growing data volumes and maintain performance benchmarks across increasing workloads.
c. **Data Security and Compliance:** The EDMG solution must ensure data security through encryption, access controls, and audit logging to meet regulatory and organizational compliance standards.
d. **Metadata Management and Cataloging:** The solution must automatically catalog and manage metadata across connected data sources, supporting organization-wide discoverability and governance.

e. **Data Quality Management and Monitoring:** The solution must automatically assess, profile, and score data quality, alerting stakeholders to issues that fall below defined thresholds.

f. **Workflow**: The solution must support configurable workflows that automate data validation, governance, and approval processes for improved data governance.

g. **Master Data Management:** The EDMG solution must provide tools for managing and synchronizing master data to ensure consistency across all data domains.

h. **Service Level Requirements:** The solution must meet agreed service level objectives, including availability, response time, and support responsiveness, to maintain uninterrupted operations.

i. **Reporting and Analytics**: The solution must offer robust reporting and analytics capabilities, enabling users to generate insights and track data management metrics.

j. **Configurability**: The EDMG solution must allow configuration to meet organizational needs without requiring extensive custom development.

3.7 Functional Requirements

The CIPC has developed a comprehensive spreadsheet of functional requirements, provided as Annexure C - Functional/Technical Requirements. This document encompasses system requirements aligned to the business capability model defined in section 3.1 Background and Current State Overview. Furthermore, Annexure C - Functional/Technical Requirements provides an itemized list of detailed functional requirements for the EDMG solution. The CIPC has identified each requirement as a core feature. In totality, the EDMG's system functional requirements include:

A. **Data Discovery / Catalog:** Automated metadata extraction from diverse sources (RDBMS, procedural code, servers, BI environments, cloud, and spatial apps).

B. **Data Lineage:** Full data lineage tracing from source to target (e.g., Oracle, Informix, SQL).

C. **Data Quality / MDM:** Automatic data quality profiling and scoring, with support for spatial and non-spatial databases and MDM classification.

D. **Data Governance Workflow:** Automated governance workflows for data validation, glossary generation, sensitive data detection, and open data designation.

3.8 Implementation Service Requirements

The EDMG implementation and Ongoing Services effort shall be completed in the project phases outlined below (with minimum deliverables from the bidder noted), including but not limited to:

A. Planning and Discovery

Objective: During this initial phase, the Contractor will work closely with the CIPC's project team to assess the current data management environment, gather detailed requirements, and develop foundational documentation for the EDMG implementation. This phase will focus on ensuring a clear understanding of the CIPC's key objectives, requirements, and constraints.

Contractor Responsibilities:

The Contractor shall:

- conduct comprehensive requirements-gathering sessions, including virtual interviews, virtual workshops, and surveys with CIPC stakeholders. Requirements must be captured in a Requirements Traceability Matrix (RTM) to ensure that all are addressed in subsequent phases.
- Be responsible for identifying both functional and non-functional requirements, including performance, security, and scalability requirements.
- Lead workshops to gather insights and ensure that all CIPC Core Use Cases (CCUC) are fully defined and documented.
- Ensure that all design artifacts are reviewed and formally approved by CIPC stakeholders before proceeding to the implementation phase. Any requested changes should be incorporated, with clear communication of any impacts to the timeline or cost.
- Identify the solution modules and configuration requirements for all CIPC Core Use Cases (CCUC).
- The solution design will identify out-of-box functionality and any custom workflows.

Deliverables

- **Project Charter**
  - A comprehensive document outlining the project's purpose, scope, objectives, stakeholders, and success criteria
  - Formal approval from both the CIPC and Contractor to ensure alignment on the project's goals and vision
- **Project Plan and Organizational Chart**
  - A comprehensive plan detailing timeline, key milestones, deliverables, structure of the project team, and weekly status report. The organizational chart will provide clarity on roles and reporting structures for both the Contractor and CIPC personnel.
- **Detailed Requirements Document**
  - Based on industry frameworks this document will capture the CIPC's core use cases, functional needs, and technical specifications.
- **Method for change control and communication.**
- **All risks and mitigation plans.**

B. <u>Solution Design Phase</u>

Objective: Using the requirements from the discovery phase, the contractor will create a detailed design for the EDMG solution, ensuring that it is adaptable to the CIPC's existing infrastructure and scalable for future growth.

Contractor Responsibilities

The Contractor shall:

- Develop a comprehensive design document that includes system architecture, data flows, integration points, and governance processes. These designs must be in alignment with CIPC infrastructure and adhere to security and regulatory requirements.
- Ensure that all design artifacts are reviewed and formally approved by CIPC stakeholders before proceeding to the implementation phase. Any requested changes should be incorporated, with clear communication of any impacts to the timeline or cost.
- Identify the solution modules and configuration requirements for all CIPC Core Use Cases (CCUC).
- The solution design will identify out-of-box functionality and any custom workflows.

Deliverables

- High-level architecture and system design documents
  - A blueprint that defines how the EDMG solution will be integrated into the CIPC's IT ecosystem. This will include data pipelines, governance processes, and data storage layers, crafted with a focus on scalability, modularity, and security.
- Data governance framework tailored to the CIPC's policies and needs
  - A customized governance model aligned with best practices. This will define roles and responsibilities around data stewardship, quality management, and data security.

C. <u>Solution Configuration and Implementation Phase</u>

Objective: During this phase, the contractor will configure the solution to meet the CIPC's functional, security, and operational requirements, ensuring a robust and scalable EDMG platform.

Contractor Responsibilities:

- Solution configuration in accordance with the CIPC's technical and functional requirements
- Data migration plan and execution strategy for integrating legacy data systems
- Installation and setup of EDMG solution components (e.g., data catalog, metadata management, data quality management, and MDM modules)
- Integration with existing CIPC systems and applications
- Execution of defined use cases, including end-to-end workflows that align to the CIPC Core Cases.

Deliverables:

- Configuration of Core Modules
  - Configuration of key components such as data catalogs, metadata management, data quality management, and data governance framework (observability)
- **Data Migration**
  - A thorough migration plan to ensure all legacy data systems are correctly integrated with the new solution. data mapping, cleansing, and validation will be critical steps in ensuring data integrity.
  - CIPC Core Use Cases (CCUC)

- Full integration of the CIPC's core use cases within the platform, ensuring that workflows, automation, and data processing protocols align with operational objectives.
- Configure role-based access for CIPC project team users.
- Configure and document each module to satisfy the CIPC's core use cases.
- Unit test configuration to ensure product is functioning as expected.

D. Testing and Validation Phase

1. Objective: The Contractor must conduct testing phase to ensure that the implemented solution is functional, secure, and aligned with both business and technical requirements this includes developing, conducting, and providing support to the CIPC and applicable stakeholders in test plans, test scripts, test cases, and test input data. The Contractor must lead all testing efforts except for user acceptance testing (UAT), user acceptance testing will occur during a time period agreed upon in advance with CIPC stakeholders.
2. Install fully functional production and non-production environments.
3. Confirm the operation and functionality of the installed components.

Contractor Responsibilities:

The Contractor shall:

- provide a detailed Test Plan, covering all aspects of testing (unit, system, integration, performance, and user acceptance testing). The Test Plan should also define test cases, success criteria, and test data requirements.
- Implement automated testing frameworks where feasible to ensure continuous validation of key solution components and to expedite defect identification and resolution.
- Implement a defect tracking system to log, prioritize, and resolve issues identified during testing. All defects must be documented, categorized (e.g., critical, major, minor), and addressed in a timely manner.
- High-priority defects must be escalated and resolved prior to moving to the Go-Live phase.

Deliverables

User Acceptance Testing (UAT): Engaging key CIPC stakeholders to conduct UAT to verify that the solution meets end-user needs. All test results will be documented, with an emphasis on resolving identified defects before go-live.

1. Provide a testing overview and educational session for CIPC test participants.
2. Identify and develop test scenarios for each use case.
3. Define and create a feedback submission process.
4. Present test findings to CIPC stakeholders to prioritize remediation and/or enhancement activities.

- Unit, Integration, and System Testing: Detailed testing scripts and documentation that validate each module's functionality, ensuring each works as intended and integrates smoothly.
- Requirements Traceability Matrix (RTM) to ensure that all deliverables are addressed in subsequent phases and will be used to identify the modules to be used and the user testing to be completed.

- Security and Compliance Audits: Formal validation ensuring that the EDMG solution adheres to the CIPC's security standards and meets regulatory compliance.

E. Training

1. Define a training program to educate and train administrator CIPC personnel in all details of the EDMG solution to enable successful operation and management of the system and each of its components throughout its useful life.
2. A training syllabus and plan that proposes the training courses to be delivered to the CIPC based on the future governance and organizational model.
3. Provide a method/channel CIPC personnel to access up to date documentation related to all software updates, upgrades, and new feature releases.
4. Provide training to the CIPC's project team, departmental users (data liaisons), and other identified stakeholders to understand any changes to their current workflows and how to request support services from the support provider.

F. Go-live/release process

1. Go-live checklist and detailed day-of launch plan to ensure alignment and commitment from all stakeholders and responsible parties.
2. Roles and responsibilities for deployment.
3. Outline process for transitioning to maintenance.

G. Maintenance

1. Provide technical support services after go-live, to ensure that the EDMG solution continues to function as intended, remains stable and secure.
2. Provide infrastructure diagrams and documentation for installation.
3. Provide a Service Level Agreement (SLA) support model definition to include:
   a. RACI matrix between the bidder and the CIPC that is regularly updated to align with future support needs.
   b. Maintenance and enhancement support agreement based upon the requirements agreed upon by the Contractor and the CIPC.
   c. "Request for support" procedures and average resolution response timeframe
   d. Issue prioritization and escalation processes.
   e. Methodology used to manage software upgrades, enhancements, and patches (including quality assurance practices).
   f. List of any technical and end user administrator self-help resources available.
   g. The quantitative response in percentage (i.e., 99.9%) including providing how these percentages are computed.
   h. Description of how the SLA will be tracked and validated.
   i. Projected maintenance schedule(s), product lifecycle chart, and contents.
   j. Description of the process used to restore selected data files or timepoint restore (both structured and unstructured), including how requests are made and the expected restoration time.

k. A description of the performance standards (e.g.: system latency, load tests during peak times and off-peak times.) for system availability.

l. Implementation of monitoring systems which provide documentation of downtime or issues per year in total availability % per year, downtime per year, downtime per month, and downtime per week.

m. Description of any exclusion parameters of application performance.

4. Ongoing maintenance and enhancement support execution based upon the terms of the SLA agreement.

3.9 Additional Services and Enhancements

At some point after the initial use cases are configured, the CIPC may elect to expand solution capabilities and on-board additional departments into the identified solution. In the Price Proposal, please clearly outline the position title, duties, and hourly salary required to provide staff augmentation. Identify whether these staff resources will be provided through your company or a business partner.

3.10 Deliverables, Acceptance Criteria, and Payment Schedule

1.Deliverable:

a. All contract deliverables are to be given a unique number and tied to the project schedule. The dates for deliverable submissions, review comments, and resubmissions will be tracked in the project schedule. The CIPC shall provide a project repository tool (e.g., Project Server / SharePoint) to record project deliverables and manage project tasks.

b. For every deliverable, the Contractor shall request the CIPC's project manager or designee to confirm receipt of that deliverable by sending an e-mail identifying the deliverable name and date of receipt. Drafts of each final deliverable, except status reports, are required at least one week in advance of when the final deliverables are due.

2.Acceptance Criteria:

a. The Contractor's deliverables will be subject to the review and approval of the CIPC's project manager or designee and/or additional stakeholders depending on the deliverable. If requested by the CIPC's project manager, the Contractor must provide walkthroughs of deliverables to facilitate the project manager's deliverable reviews.

b. The CIPC project manager shall notify Contractor within ten business days of its receipt of a deliverable, or as otherwise agreed to by the CIPC's project manager and Contractor, of its approval or rejection, with the reason(s) for rejection. In the case of an initial rejection, the Contractor shall have five (5) business days, or as otherwise agreed to by the CIPC' project manager, to correct the deliverable and resubmit for the project manager's review.

c. Approval shall be granted at the CIPC's project manager sole discretion if the deliverable meets all requirements.

d. The Contractor must account for the CIPC's project manager review process when developing schedules, project plans, and timelines. Specific deliverables and acceptance criteria will be finalized as part of the project pre-planning and preparation.

3.Payment Schedule:

a. Payment schedule shall be tied to milestones based on successful completion of deliverables and negotiated between the CIPC and the selected bidder.

3.11CIPC Core Use Cases

Bidders to review the CIPC core use cases listed in "Annexure C - Functional & Technical Requirements". The five CIPC core use cases listed in Annexure C are highlighted in blue.

3.12Roles and Responsibilities

A. Contractor Responsibilities

1. The Contractor is expected to own each of the deliverables and activities within each phase of the effort, with input from CIPC stakeholders. This includes project management and ownership of status meetings and status reports to ensure the on-time delivery and quality of deliverables.
2. The Contractor will work with the CIPC's project management team to address any roadblocks or risks in the project and escalate issues based on the agreed upon escalation plan determined by the CIPC and Contractor teams.

B. CIPC Responsibilities

1. The CIPC will participate in all necessary activities and provide the required information in a timely manner to ensure the success of each phase.
2. The CIPC's Project Management team will work closely with the Contractor as needed and will: (a) approve priorities, detailed project plans and schedules; (b) notify Contractor in writing of any engagement or performance issues; and (c) assist in resolving issues that may arise.
3. Identify stakeholders, SME's, core project team members.
4. Assist the Contractor with scheduling meetings, as needed and will participate in meetings, and workshops.
5. Make available all pertinent documents, information, and electronic files in a timely manner.
6. Provide a response to all questions regarding the acceptability of any work performed under this Scope of Work.

4. <u>Time frames</u>

The contract period is 5 Years.

5. ***BID COSTING***

REFER AND COMPLETE ANNEXURE "I" PAGE 34 &35

THE FOLLOWING DOCUMENTS TO BE ATTACHED

1. **SDB 3.3: PRICING SCHEDULE**
2. **SBD FORM 1: INVITATION TO BIDS**
3. **A BIDDER *MUST* ATTACH *PRICE BREAKDOWN IN THE BIDDER'S COMPANY LETTERHEAD STATING UNIT COSTS AS WELL AS THE TOTAL BID PRICE INCLUSIVE OF ALL FOR THE DURATION OF THE CONTRACT***
4. **BIDDERS TO COMPLY WITH ALL CONDITIONS BELOW AS WELL AS THOSE ON PAGE 5 WITH REGARDS TO PRICE**

The costing should be based on all requirements of the terms of reference. The onus is upon the prospective bidders to take into account all costs and to CLEARLY indicate the price. Cost breakdown must be provided, covering all required aspects in this tender. **NB The total price must be carried over to the pricing schedule and *will be used to evaluate the bids*. Prices must be firm for the duration of the project. PRICE CARRIED OVER TO SBD FORM 3.3 AND SBD FORM 1 MUST INCLUDE ALL COSTS FOR THE DURATION OF ALL PERIOD STATED ABOVE UNDER PRICING. *FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY INVALIDATE THE BID.***

Note: Service providers will be responsible for all costs e.g. transportation for ALL activities associated with this bid.

6. **REPORTING**

The contracted bidder's account manager will report to the relevant CIPC Project Manager or his/her delegate.

8. **WORKING CONDITIONS**

Resource(s) may be required to work outside of business hours as and when needed (rate to remain the same). Working remotely will be allowed, but the CIPC may require on-site working as and when needed for certain projects. Resource will be required to physically report to CIPC offices, 77 Meintjies Street, Sunnyside, Pretoria, 0002, as and when required.

8.1 Equipment

Contractor will furnish all necessary labor, tools, equipment, and supplies to perform the required services at the CIPC facilities designated, unless otherwise specifically addressed in the scope.

8.2 Proprietary rights

Contractor warrants that:

A. The hardware, software, application(s), or other technology provided to the CIPC pursuant to this Contract (collectively, the "Technology Assets") will be free of the rightful claim of any third-party for, or by way of, infringement or misappropriation of patent, copyright, trade secret, trademark or other rights arising under the laws of the United States;

B. No act or omission of Contractor will result in a third-party holding any other claim that interferes with the CIPC's enjoyment or use of the Technology Assets.

C. Contractor owns or possesses all right(s), title(s) and license(s) necessary to perform its obligations, hereunder; and

D. As of the effective date and throughout the term (duration) of this Agreement, Contractor has not conveyed and will not convey any rights or licenses to any third-party regarding the Technology Assets, except to the extent the Technology Assets consist of commercial-off-the-shelf or similar software product(s).

The proprietary right with regards to copyright, patents and any other similar rights that may result from the service rendered by the resource belong to CIPC. The final product of all work done by the contractor, shall at the end of service period, be handed over to CIPC. The contractor may not copy documents and/or information of the relevant systems for any other purpose than CIPC specific.

8.3 Indemnity / Protection / Safeguard

- The resources safeguard and set CIPC free to any losses that may occur due to costs, damage, demands, and claims that is the result of injury or death, as well as any damage to property of any or all contracting personnel, that is suffered in any way, while delivering a service to CIPC.
- The resources safeguard and set CIPC free to any or all further claims for losses, costs, damage, demands and legal expenses as to the violation on any patent rights, trademarks or other protected rights on any software or related data used by the resources.

8.4 Occupational Health and Safety Obligations

CIPC is committed to ensure a safe work environment, impose protection towards the health and safety of all personnel and prevent workplace injuries or losses. Mandataries/ service providers are employers, with duties prescribed in the Occupational Health and Safety Act No. 85 of 1993 as amended and other legislative obligations. Mandataries/ service providers shall strictly adhere to and ensure that their personnel adhere to the provisions of the OHS Act 85 of 1993 inclusive of required OHS obligations (CIPC OHS requirements and all other applicable legislation). The awarded service provider is required to provide assurance by submitting the necessary and/or obligated Occupational Health and Safety requirements to CIPC. The necessary and/or obligated Occupational Health and Safety requirements include but not limited to:

- Valid COIDA Letter of Good Standing, or a licensed compensation insurer.
- The acceptance of Occupational Health and Safety Legislative Obligations and Other Requirements.
- The Occupational Health and Safety Act 85 of 1993 Section 37(2) Agreement
- Signed Health, Safety & Environmental Policy Signed by CEO OHS Act Sec 16(1).
- Other Occupational Health & Safety requirements (OHS file) compliance.

8.5 Quality

The Divisional Manager / Senior Manager Enterprise Information Management will subject the quality and standard of service rendered by resources to quality control. Should CIPC be of the opinion that the quality of work is not to the required level, the service provider will be requested to provide another resource. The service provider will carry the cost related to these changes.

7. SPECIAL CONDITIONS

I. The bidder must provide assurance/guarantee to the integrity and safe keeping of the information (that it will not amended/corrupted/distributed/permanently stored/copied by the service provider) for the duration of the contract and thereafter.

II. CIPC reserves the right to negotiate with the successful bidder on price.

III. The Service Provider must ensure that their work is confined to the scope as defined and agreed.

IV. Travel between the consultant's home, place of work to the **dti Campus (**CIPC) will not be for the account of CIPC, including any other disbursements unless agreed to in writing by CIPC prior to the expense being incurred.

V. Government Procurement General Conditions of Contract (GCC) as issued by National Treasury will be applicable on all instances. The general conditions are available on the National Treasury website (www.treasury.gov.za);

VI. No advance payment will be made. Payment would be made in terms of the deliverables or other unless otherwise agreed upon by CIPC and the successful bidder. CIPC will pay within the prescribed period according to PFMA.

VII. The price quoted by the prospective service provider must include Value Added Tax (VAT).

VIII. The successful bidder must at all times comply with CIPC's policies and procedures as well as maintain a high level of confidentiality of information.

IX. The successful bidder must ensure that the information provided by CIPC during the contract period is not transferred/copied/corrupted/amended in whole or in part by or on behalf of another party.

X. Further, the successful bidder may not keep the provided information by way of storing/copy/transferring of such information internally or to another party in whole or part relating to companies and/or close corporation.

XI. As such all information, documents, programs and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner and/or his/her delegate.

XII. The service provider will therefore be required to sign a Declaration of Secrecy with CIPC. At the end of the contract period or termination of the contract, all information provided by CIPC will become the property of CIPC and the service provider may not keep any copy /store/reproduce/sell/distribute the whole or any part of the information provided by CIPC unless authorized in terms of the Declaration of Secrecy.

XIII. The Service Provider (successful bidder) will be required to sign a Service Level Agreement with CIPC prior to the commencement of the contract; and

XIV. Compliance with PFMA regulations in terms of the safeguarding of assets and adequate access control must be guaranteed. Assets include all infrastructure, software, documents, backup media and information that will be hosted at the Offsite ICT Recovery Site. These security measures must be specified in the SLA.

XV. As the commencement of this contract is of critical importance, it is imperative that the prospective Service Provider has resources that are available immediately. Failure to commence with this contract immediately from date of notification by CIPC could invalidate the prospective Service Provider's proposal.

XVI. The Service Provider shall be required to provide training & skills transfer for the services as per paragraph 3 of this document.

XVII. Service Provider shall provide CIPC with all the license documentation that CIPC is entitled to as per the costing of the licenses.

XVIII. The Service Provider shall be required to provide training & skills transfer for the services as per paragraph 3 of this document.

XIX. Bidders shall be subjected requested to demonstrate all claims made in the proposal.

XX. The resources that a bidder supply will be subjected to an assessment result which will determine the suitability of the service provider to implement against the assignment of the ToR. Failure to provide suitable candidates will lead to cancellation of award of the tender.

XXI. CIPC reserves the right not to make this appointment

XXII. The service provider will sign a confidentiality agreement regarding the protection of CIPC information that is not in the public domain.

XXIII. Appointment will be subject to positive security screening results by the State Security Agency.

XXIV. All possible steps shall be taken by the contract to ensure full execution of this agreement.

XXV. CIPC reserves the right not to make this appointment

8. EVALUATION PROCESS (Criteria)

The evaluation process will be done in accordance with the following criteria: Bids will be evaluated in accordance with the **80/20** preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

15.1. EVALUATION PROCESS (Criteria)

The evaluation process will be done in accordance with the following criteria: Bids will be evaluated in accordance with the **80/20** preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

Evaluation (Phases): The evaluation will be completed in 4 phases:

- **Phase 1: Compliance to Mandatory requirements**
- **Phase 2: Compliance to Specification**
- **Phase 3: Functional Evaluation**
- **Phase 4: Functional Evaluation**

15.2. PHASE 1: COMPLIANCE TO MINIMUM REQUIREMENTS AND MANDATORY REQUIREMENTS

During Phase 1 all bidders will be evaluated to ensure compliance to minimum document requirements. Without limiting the generality of the CIPC's other critical requirements for this Bid, bidder(s) ***must submit the documents*** listed in the **Table** below. All documents must be completed and signed by the duly authorized representative of the prospective bidder(s). During this phase Bidders' response will be evaluated based on compliance with the listed administration and mandatory bid requirements. All bidders that comply with the minimum requirements will advance to Phase 2.

BIDDERS TO COMPLETE THE TABLE BELOW

Item No	Document that must be submitted	Compliance provide ANSWER: Yes /No	Non-submission may result in disqualification
1.	**Invitation to Bid – SBD 1**		Complete and sign the supplied pro forma document.
2.	**Tax Status – SBD1**		Bidders must submit **Tax Clearance Certificate (TCC) PIN** **The TCS PIN** will be used for the verification of tax compliance status a Bidder
3.	**Declaration of Interest –SBD 4**		Complete and sign the supplied pro forma document.
4.	**Declaration of Bidder's Past Supply Chain Management Practices – SBD 8**		Complete and sign the supplied pro forma document.
5.	**Certificate of Independent Bid Determination – SBD 9**		Complete and sign the supplied pro forma document.
	Completion in full of the Request for Proposal documents		Bidder to complete and sign documents
6.	**BIDDERS TO SUBMIT VALID AND COMPLIANT B-BBEE Certificate (Compulsory). Latest valid BBBEE certificate- SANAS Accredited or sworn affidavit for EME/QSE signed by the deponent and the Commissioner of Oath** **FAILURE TO SUBMIT WILL IMMEDIATELY DISQUALIFY YOUR BID.** ***THIS DISQUALIFICATION DOES NOT APPLY TO NON-SOUTH AFRICAN BIDDERS***		**VALID AND COMPLIANT B-BBEE Certificate (Compulsory)** **FAILURE TO SUBMIT WILL IMMEDIATELY DISQUALIFY YOUR BID**
7.	**Registration on Central Supplier Database (CSD) Compulsory** Note: ***Important: Bidders to submit valid and compliant B-BBEE Certificate as well as the CSD report. The*** BBBEE certificate- SANAS Accredited or sworn affidavit for EME/QSE ***is the primary verification document to claim points for specific goals for this bid. Failure to submit a compliant B-BBEE certificate will result in disqualification.***		The Service Provider is encouraged to be registered as a service provider on the Central Supplier Database (CSD). Visit https://secure.csd.gov.za/ to obtain your. Vendor number. Submit PROOF of registration on the Central Supplier Database (CSD Report) **SUBMIT SUPPLIER UNIQUE REFERENCE NUMBER**
8.	**NB: Pricing Schedule:** **Compliance to PAGE 42 TO 47- ANNEXURE "I"** ***FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.***		Submit full details of the Price Proposal in a separate **SEALED** envelope. Price must be carried over to **BOTH SBD 3.3 (Pricing Schedule) and SBD FORM1**: (Invitation for Bids). *The Total Bid Amount (**CEILING AMOUNT**) will be used for the evaluation of bids therefore it must be inclusive of all costs for the duration of the contract)* ***FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.***
9.	**IMPORTANT:** ***SUBMISSION OF USB*** **REFER TO PAGE 5** **BIDDERS TO READ AND UNDERSTAND THE CONDITIONS STATED FROM PAGE 5 OF THIS TOR** ***FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.***		. Bidders must submit a USB with their proposal- 1 copy of the original document . USB to be submitted in pdf format and to be read only . All documents to be signed and bidders initial each page . **Bidders must check that USB sticks open, are readable, and contain no blank pages, documents, or folders. Ensure that each folder created is numbered and avoid clustering folders with many documents rather create separate folders.** . No password protected USB allowed. Do not submit CDS . Bidders will be disqualified should the requirements mentioned on page 3 and 6 not complied with. . ***Important***: The USB will be used for evaluation purposes up to tender award, so all documents must be included in the USB, including SBD forms, technical proposal mandatory documents etc.. . **FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.**
10.	**Note: All prospective bidders will be expected to attend a mandatory briefing session/site visit as determined by the CIPC where questions will be addressed by a panel of the CIPC.**		**FAILURE TO ATTEND THE COMPULSORY BRIEFING SESSION WILL RENDER YOUR BID BEING DISQUALIFIED**
11.	**Mandatory Requirement: OEM Certificates/Partnership letters for the proposed solution. (bidders to submit relevant accreditation certificate/letter) –** **The bidders must provide a letter from Solution Vendor Original Equipment Manufacturer (OEM) which indicates that they are accredited for product/Solution/Systems/Technology manufacturer /owner authorising the resale or support of the proposed Product/Solution/System/Technology.** **In the event that the bidder is the owner of the proposed Product/Solution/Systems/Technology, a letter must be attached for confirmation.**		**The letter or a testimonial or certification must be submitted in order to proceed to the next phase** (phase 2). Bidders to ensure that a letter/ testimonial /certification etc. addressing this requirement is attached. All bidders are required to comply with this requirement. **Should there be no letter/ testimonial /certification etc attached the bid *will immediately be disqualified.*** The letter/ testimonial /certification must be signed dated by authorized representative It should state expiry date or validity **FAILURE TO SUBMIT WILL RENDER YOUR BID BEING DISQUALIFIED**
12.	**BIDDERS TO INDICATE IF THEY READ AND UNDERSTOOD THE CONDITIONS STATED IN PAGE 3 TO PAGE 5 OF THIS TOR**		***FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.***

ALL BIDDERS THAT COMPLY WITH THE MINIMUM REQUIREMENTS WILL ADVANCE TO PHASE 2.

15.3. PHASE 2: COMPLIANCE TO SPECIFICATION

BIDDERS TO NOTE AND COMPLY TO THE FOLLOWING:

1. Bidders are required to comply to the specification below as well as address the requirement of the terms of reference.
2. Bidder must attach evidence or proof for all the capabilities below.
3. The evidence will be used for evaluation.
4. Bidders who fail to demonstrate/attach/provide evidence will not proceed to Phase 3 –functional evaluation.
5. The bidders must **fully comply** to answer everything, with nothing left unanswered as failure will disqualify the bidder to proceed to Phase 3 – functional evaluation. No blank sheets will be accepted
6. Bidders must indicate **exactly to the page** where it shows that they comply as failure will disqualify the bidder to proceed to Phase 3 – functional evaluation.
7. Bidders must **not direct CIPC** to any other tender as doing so will disqualify the bidder from proceeding to Phase 3 – functional evaluation.
8. Bidders must provide CIPC with a **relevant proposal** that indicates how the prospective bidder will deliver the product / service / proposed solution.
9. ***NOTE***: Bidders ***MUST*** provide all the information highlighted in ***BLUE*** and specify where to find the information in the bid proposal. Failure to comply to any of the requirements highlighted in blue will immediately disqualify the bidder's proposal and will not be evaluated for Phase 3 -Functional Evaluation.

FAILURE TO COMPLY WITH THESE REQUIREMENTS SHALL IMMEDIATELY DISQUALIFY A BIDDER.

Phase 2: The following Table to be completed by Bidder: Failure to comply will disqualify the Bid

No	SOLUTION CAPABILITIES		PLEASE SPECIFY: COMPLY / NOT COMPLY	Evidence (Page #) State page number where # evidence/proof is placed / attached in the "*USB*"
1	**Data Discovery /Catalog**	Provides ability to connect to, scan, and automatically extract the most granular metadata from data assets contained in relational database management system (RDBMS), procedural and scripting code, hosted BI/reporting environments, cloud environments, and spatial applications.		
2	**Data Discovery /Catalog**	Provides unlimited metadata ingestion through plug-n-play connectors, extensions, open API, and SDK framework along with a suite of file import templates.		
3	**Data Discovery /Catalog**	Provides insights into data uses such as reporting and/or metrics.		
4	**Data Discovery /Catalog**	Provides customizable dashboard views.		
5	**Data Discovery /Catalog**	Provides drill downs into key data catalog attributes such as sensitive data, top data sources, data lineage and operational elements.		
6	**Data Discovery /Catalog**	Provides the currency of data or date when it was last updated/modified.		
7	**Data Discovery /Catalog**	Provides ability to store and display data owners per data asset.		
8	**Data Discovery /Catalog**	Provides a display of CIPC users with access to the data assets and the last date of access.		
9	**Data Discovery /Catalog**	Provides impact assessment for data changes (type, length, name, etc).		
10	**Data Discovery /Catalog**	Provides ability to flag data fit for public release.		
11	**Data Discovery /Catalog**	Provides a semantic layer.		
12	**Data Discovery /Catalog**	Provides ability to flag reference/master data codes enterprise wide and by business domains.		
13	**Data Discovery /Catalog**	Provides data certification tags/management.		
14	**Data Discovery /Catalog**	Provides auto detection of sensitive data (PII, PHI and PCI) and recommend actions, risk ratings, and enables data elements to be manually classified or flagged as sensitive.		

No	SOLUTION CAPABILITIES		PLEASE SPECIFY: COMPLY / NOT COMPLY	Evidence (Page #) State page number where # evidence/proof is placed / attached in the "*USB*"
15	**Data Lineage**	Provides data insights by leveraging machine learning (ML), artificial intelligence (AI), and natural language processing (NLP).		
16	**Data Lineage**	Evaluate the tool's ability to track data lineage and profile data for quality assessment.		
17	**Data Lineage**	Natively generates data lineage for any data asset field / column from the source system all the way to the final target regardless of the target technology (database table, application, dashboard, etc.).		
18	**Data Lineage**	Provides interactive and drillable lineage diagram that provides optics at the component and object levels for risk and impact assessments for changes.		
19	**Data Lineage**	Provides Intuitive search capability for each data element (column).		
20	**Data Lineage**	Provides depiction and diagram data lineage from source to reporting layers, including all transformations in an easy-to-understand interface for both the business and technical perspectives.		
21	**Data Lineage**	Provides easy-to-understand pre-built views/reports of all potential upstream or downstream impacts of a change at a column, table or report level.		
22	**Automated Data Quality Profile and Assessments / Master Data Management**	Automatically profile and assess or score the data quality of the following data asset types and sense and classify reference/master data: Spatial database tables and non-spatial database tables.		
23	**Automated Data Quality Profile and Assessments / Master Data Management**	Provides a scheduler that automatically profiles and assesses data quality of all data assets (dataset, table and/or field level) based on configurable rules.		
24	**Automated Data Quality Profile and Assessments / Master Data Management**	Provides data profiling and data assessments with details and metrics alongside metadata details for easy visibility and understanding.		
25	**Automated Data Quality Profile and Assessments / Master Data Management**	Provides auto generation of suggested data quality rules and assessment algorithms. This functionality is needed as an input into future data prioritization and governance workflows such as certifying data for public and/or internal use.		

No	SOLUTION CAPABILITIES		PLEASE SPECIFY: COMPLY / NOT COMPLY	Evidence (Page #) State page number where # evidence/proof is placed / attached in the "*USB*"
26	**Automated Data Quality Profile and Assessments / Master Data Management**	Provides ability to cleanse, match, link, identify, and reconcile master data in different data sources to create and maintain the "golden record".		
27	**Automated Data Quality Profile and Assessments / Master Data Management**	Stores and distributes reference data created externally. Examples of reference data: county, currency, codes, administrative regions, etc.		
28	**Automated Data Quality Profile and Assessments / Master Data Management**	Manages different types of master data (person, product, etc.) inside the same platform.		
29	**Automated Data Quality Profile and Assessments / Master Data Management**	Creates and maintains hierarchical constructs/models used by the business to aggregate information for reporting and analytics.		
30	**Automated Data Quality Profile and Assessments / Master Data Management**	Manages relationships across entity instances within the same entity class, as well as across entity classes.		
31	**Automated Data Quality Profile and Assessments / Master Data Management**	Identifies records in a dataset that refer to the same entity across different data sources.		
32	**Automated Data Quality Profile and Assessments / Master Data Management**	Resolves duplicate representation of the same entity instance based on a set of defined attribute/rules and assign unique identifier for each instance.		
33	**Automated Data Quality Profile and Assessments / Master Data Management**	Enables data stewards to monitor data quality and recommend and track remediation actions.		

No	SOLUTION CAPABILITIES		PLEASE SPECIFY: COMPLY / NOT COMPLY	Evidence (Page #) State page number where # evidence/proof is placed / attached in the "*USB*"
34	**Data Governance Workflow and Framework Support**	Generate and execute an integrated workflow to automate data value validation and loading of data.		
35	**Data Governance Workflow and Framework Support**	Generate and execute a workflow that auto generates business glossary terms (using AI or equivalent) for configured data catalog items and allows an approver to accept with no change, accept with changes or reject the result on a field basis along with a full audit trail attached to the data asset.		
36	**Data Governance Workflow and Framework Support**	Generate and execute a workflow to standardize data assets with South African address values and auto detect data assets in the catalog to attach the policy to.		
37	**Data Governance Workflow and Framework Support**	Generate and execute a workflow to automatically discover all catalog items containing sensitive information and flag the items.		
38	**Data Governance Workflow and Framework Support**	Generate and execute a workflow to automatically discover all catalog items containing non-sensitive information and flag the items as eligible for open data and allows an approval process to accept or reject the designation.		
39	**Data Governance Workflow and Framework Support**	Generate and execute a workflow to automatically discover high value data assets.		
40	**Data Governance Workflow and Framework Support**	Generate and execute a workflow to automatically discover high risk data assets.		

No	SOLUTION CAPABILITIES		PLEASE SPECIFY: COMPLY / NOT COMPLY	Evidence (Page #) State page number where # evidence/proof is placed / attached in the "*USB*"
41	**Data Governance Workflow and Framework Support**	Provides enrichment of the data catalog with a business glossary (definition of data assets in business terms), creation, configuration and attachment of relevant policies, standards, regulations, and other data governance rules		
42	**Data Governance Workflow and Framework Support**	Finds and classifies sensitive data (Personally Identifiable Information (PII), Protection of Personal Information Act (POPIA), GDPR (General Data Protection Regulation),NIST Cybersecurity Framework (CSF),and Payment Card Industry Data Security Standard (PCI), among others). Leveraging AI and ML to speed deployment.		
43	**Data Governance Workflow and Framework Support**	Audits and monitors data assets in real-time, for data governance compliance through rules-based configuration. Pre-built data governance audit/compliance risk-reduction workflows that highlight the distribution of data are highly desired.		
44	**Data Governance Workflow and Framework Support**	Automates data security monitoring of sensitive data showing usage and permissions heatmaps to identify data and systems that are at risk of security exposure. Enable the configuration of alerts to data owners based on risk criteria.		
45	**Data Governance Workflow and Framework Support**	Enables automated workflows to capture issues/needs, actions and resolution at the data asset level to streamline data governance tasks such as data access or sharing requests, open data release, compliance audits, and policy changes.		
46	**Data Governance Workflow and Framework Support**	Tracks data access and changes.		
47	**Data Governance Workflow and Framework Support**	Automates version management and change control. Version all metadata and related mappings and provide change comparison reports to support audits and impact analysis.		
48	**Data Governance Workflow and Framework Support**	Classifies generative AI and ML data outputs and manage related model inputs and outputs.		
49	**Data Governance Workflow and Framework Support**	Provides auto-glossary suggestions to reduce manual work of linking glossary terms to each data table.		
50	**Data Governance Workflow and Framework Support**	Provides ability to collaborate with stakeholders involved in governance activities using embedded integration with collaboration tools to make metadata accessible in native workflows and tools.		

No	SOLUTION CAPABILITIES		PLEASE SPECIFY: COMPLY / NOT COMPLY	Evidence (Page #) State page number where # evidence/proof is placed / attached in the "*USB*"
51	**General Technology Requirements**	Solution provides a clear and easy method to search and navigate site content which will enable users to get to their desired information as efficiently as possible.		
52	**General Technology Requirements**	Solution adheres to best practices and addresses all regulatory and compliance obligations related to data.		
53	**General Technology Requirements**	Solution is highly scalable (keeps up with ever increasing volumes of data asset demands).		
54.	**General Technology Requirements**	Solution provides capability to scan/process a large volume of data assets (1M+ objects) across different technologies on a regularly cadence with no loss of performance to source systems and applications.		
55	**General Technology Requirements**	Solution provides 99.99% availability and redundancy so that patching and maintenance will be done with zero downtime and with failover to an alternate site while maintenance takes place on one site.		
56	**General Technology Requirements**	Solution ensures existing systems and applications perform optimally in the new, re-designed environment.		
57	**General Technology Requirements**	Solution integrates with the CIPC's Active Directory and Single Sign On (SSO) for user account management.		
58	**General Technology Requirements**	Solution integrates with Microsoft Power BI (enterprise reporting tool), and Oracle Data Integrator / Microsoft SSIS / Azure Data Factory (enterprise ETL tool).		
59	**General Technology Requirements**	Solution is highly secure and adhere to all CIPC requirements: SOC 2 compliant, encryption of data in transit, and encryption of data at rest.		
60	**General Technology Requirements**	Solution complies with the CIPC's Cloud Computing/Security Policy (ISP200-202), as may be amended if cloud-based.		
61	**General Technology Requirements**	Solution and any processing functionality are housed in the continental United States.		
0				
62	**General Technology Requirements**	Solution includes role-based access control (RBAC) to enable managing who has access to resources, what actions they can perform, and which areas they can access. While default roles should exist based on best practices, the solution must also support creation of custom roles and permissions as needed.		
63	**General Technology Requirements**	Solution ensures any associated data remains the sole property of the CIPC and will not be shared with any third party (without written consent from the CIPC). This includes but is not limited to metadata and usage statistics.		

Capability	Description
Knowledge & Expertise	The supplier must demonstrate and provide evidence of knowledge and experience in implementing similar solution and understanding of CIPC or similar business environments.
Resources	The supplier must have sufficient quantity and quality of resources with appropriate skill and/or certification to implement and support the solution provided.
Project Management	The supplier must use sound project management approaches to ensure success of development, implementation and support projects.
Support	The supplier must be able to meet agree service levels, use effective processes, standards and procedures for service management and must be able to call on the solution vendor/manufacturer for support if required.
Training & skills transfer	The supplier must be able to provide training for and transfer knowledge to CIPC staff training to effectively manage and support the solution.

PLEASE NOTE: CIPC reserves the right to procure only selected services based on the solution proposed, e.g., CIPC may elect to acquire the installation and implementation from one supplier, and the ongoing support from another.

FAILURE TO COMPLY WITH THE ABOVE -MENTIONED REQUIREMENTS FOR PHASE 2 SHALL IMMEDIATELY DISQUALIFY A BIDDER TO PROCEED TO PHASE 3 FUNCTIONAL EVALUATIONS

15.4. PHASE 3: FUNCTIONAL EVALUATION

All bidders that advance to Phase 3 will be evaluated by a panel to determine compliance to the functional requirements of the bid. The functional evaluation will be rated out of 100 points as per breakdown in the table that follows below:

Companies and Intellectual Property Commission
a member of the dtic group

IMPORTANT: The following documents need to be submitted as part of the proposal and will be used during the evaluation.

- Annexure K – Functional & Technical Requirements.
- Annexure "J" Security and Privacy Maturity Questionnaire

In addition to the minimum requirement all bidders must meet the following minimum qualifications:

The functional evaluation will be rated out of 100 points and will be determined as follows:

No	EVALUATION CRITERIA	Rating					Weight %	Total
		1	2	3	4	5		
1.	**CAPABILITIES FUNCTIONAL AND TECHNICAL REQUIREMENTS** ❖ Bidders are required to furnish responses for each functional and technical requirement as specified in Annexure K – Functional & Technical Requirements. ❖ Furthermore, the Bidder must provide responses to the subsequent questions pertaining to the functionality of their solution. The responses provided in Annexure K – Functional & Technical Requirements will be subject to evaluation and scoring. **Scoring will be based on the CIPC 10 Core Use Cases highlighted in Blue in Functional Requirements** ❖ Provide a narrative written in non-technical language the Bidder's overall Solution, including hosting environment, functional and technical capabilities. Include any industry-leading differentiating features your Solution possesses that may provide value to the CIPC.: The narrative **must** cover the following: 1. **Overall Solution Value Proposition:** A clear, high-level summary of the solution and the core benefits it brings to the CIPC. 2. **Hosting Environment Summary:** A non-technical explanation of the security, scalability, disaster recovery, and data sovereignty of the proposed hosting model (e.g., cloud, on-premises, hybrid). 3. **Key Functional Highlights:** A simple description of the most important workflows and how CIPC users and customers will interact with the system. 4. **Technical Robustness Explained:** A brief, non-jargon explanation of the architecture's modernity, integration capacity, and stability. 5. **Differentiating Features and CIPC Value:** Specific identification of unique, industry-leading features and a description of the **business value** (e.g., cost savings, efficiency gains, risk reduction) they will deliver to the CIPC. ***Ratings to be awarded as follows:*** 1. ***Score = 1: Critically Deficient Response (0 to 5 CIPC core Use Cases):*** *Missing or failing most core requirements. and (**0 to 2) narratives** requirements addressed and missing most required narrative components.* 2. ***Score = 2: Significant Gaps (6 to 8 CIPC core Use Cases):*** *Addresses some requirements but with notable deficiencies in compliance quality and **3 narratives** requirements addressed which only covers the basic content but lacks necessary detail, clarity, and depth in explanation.*						**30**	

	3. ***Score = 3:*** **Adequate Technical Capability (*9 CIPC Core Use Cases*):** Meets the majority of CIPC core Use Cases (9 out of 10) in functional quality and ***4 narrative*** requirements addressed. Functional and covers almost all points in Section 4.1 but may be weak on one key area (e.g., differentiating features or hosting). 4. ***Score = 4***: **Fully Compliant and Robust *(10 CIPC Core Use Cases).*** Fully meets all 10 Core Use Cases robustly and efficiently and ***5 narratives*** requirements addressed with clear, well-structured, and effectively addresses all five points in Section 4.1. Clearly mentions differentiating features showing potential value. 5. ***Score = 5:*** **Outstanding / Exceeds Requirements *(10 plus CIPC Core Use Cases):*** Fully meets and **exceeds** all 10 CIPC Core Use Cases requirements with strong detail and clarity, ***5 narratives*** requirements addressed with exceptionally well-written, compelling, and provides a strong strategic overview for all five points. Clearly links all features to substantial, demonstrable CIPC value.							

No	EVALUATION CRITERIA	Rating					Weight %	Total
		1	2	3	4	5		
2.	**BIDDER EXPERIENCE** ❖ Bidders must have been in operation a minimum of 5 years. The Bidders' normal business activity during the past 5 years will have been for providing the goods or services in this solicitation ❖ Bidders are required to furnish responses for each item as specified herein. The responses and furnished documentation will be subject to evaluation and scoring: 1. Provide the organization background information and experience for the planning, installation, configuration/integration, implementation and ongoing support of an enterprise data management solution (EDMG). In addition, the following subsections describe additional information to provide at a minimum: (Limit your responses to no more than 5 pages) (Section 3, Scope of Work): a. Provide an organizational chart and resumes for the engagement that reflects key staff involved in project implementation, ongoing relationship management, and support. b. Provide a high-level project plan and timeline. c. Provide responsibilities, estimated time assigned to the project, titles of personnel expected to be assigned to each phase of this project. Also, note any experience or certifications relevant to each phase. d. Provide a copy of the solutions standard training plan and syllabus that has been used for a customer comparable to CIPC. 2. Provide an overview of your understanding of/alignment with the future state vision described in the Scope of Work, subsection "3.3, Future State Vision" and why and how your solution and delivery would be the best to help the CIPC achieve it. (Limit your responses to no more than 10 pages): a. Provide a list of all supported connectors and features that your EDMG solution supports, and for each, indicate the current number of licensed customers using each. b. Identify the total number of your current government clients that currently license an EDMG product. c. Identify the number of years your EDMG product has been available to customers to license.						**30**	

	3. Describe your experience in providing ongoing support and maintenance after the EDMG solution has gone live and implemented? (limit your responses to no more than 5 pages) (Section 3. Scope of Work, Subsection 3.8. Implementation Service Requirements). 4. List the architecture deployment options for the software solution, the software version level and their support lifecycle. Provide architecture diagrams for each option along with advantages and disadvantages for each. 5. Describe your in-house experience/capabilities to provide services for additional maintenance or enhancement, that may be needed by the CIPC, throughout the life of the Contract (Section 3. Scope of Work, Subsection 3.9 Additional Services and Enhancements). ***Ratings to be awarded as follows***: **1. Score = 1** - Less than 5 years of experience and (0 to 2) Criteria Fully Met: Experience is critically deficient or largely irrelevant. Required organizational/planning documentation is severely lacking or non-existent. **2. Score = 2** - 5 to 7 years of experience and 3 Criteria Fully Met: Meets the mandatory floor but is the minimum level of acceptable longevity and significant gaps remain in key documentation (e.g., missing training plan or staffing detail). The breadth of relevant experience is narrow or superficial. **3. Score = 3** - 8 to 10 years of experience and 4 Criteria Fully Met: Solid business history and the Bidder meets the majority of experience requirements. Documentation is present, but lacking clarity, detail, or strong evidence of similar project success **4. Score = 4** - 11 to 14 years' experience and 4 Criteria Fully Met (All requirements): The Bidder demonstrates deep, relevant experience by fully addressing all five criteria (1-5) and providing complete, high-quality documentation for all sub-sections (a, b, c, d). ***5.*** **Score = 5** - 15+ years' experience and 4 Criteria Fully Met (All requirements): The Bidder fully meets all criteria (Score 4) and provides exceptional evidence of superior experience, such as significant government client base, innovative support models, or highly qualified personnel exceeding project needs.							

No	EVALUATION CRITERIA	Rating					Weight %	Total
		1	2	3	4	5		
3.	**METHOD OF APPROACH** ❖ Bidders are required to furnish responses for each item as specified herein. The responses and furnished documentation will be subject to evaluation and scoring: 1. Knowing the volume of the CIPC's data assets is high and includes a diverse ever-evolving technology landscape, describe (Limit your responses to no more than 10 pages) (Section 3. Scope of Work, Subsection 3.1 Background and Current State Overview): a. How will you ensure high scalability and performance of the EDMG to successfully scan and process large volumes of data assets (e.g., 1+ million) on a regular cadence? b. What safeguards will be implemented to ensure no degradation to the CIPC's source systems? c. How do you keep your solution relevant with changing technologies? Describe upgrade release cycles and another relevant information. 2. For each phase, how you will successfully complete each of the required deliverables and activities listed. Include examples that demonstrate your experience and expertise in each area. If applicable, describe the activities and deliverables you would recommend for achieving the outlined goals in addition to or in place of the required activities. (Limit your responses to no more than 10 pages) (Section 3. Scope of Work, Subsection 3.8. Implementation Service Requirements). 3. Describe your methodology and overall approach to the Configure CIPC Core Use Cases phase of the EDMG solution. How will you successfully implement each use case? Include examples that demonstrate your experience and expertise in each area. (Limit your responses to no more than 10 pages) (Section 3. Scope of Work, Subsection 3.11 CIPC Core Use Cases and Attachment C - Functional & Technical Requirements). 4. How do you ensure alignment with the Data Owner(s) and/or business stakeholders during the project for the listed phases? (Limit your responses to no more than 3 pages) (Section 3. Scope of Work, Subsections: 3.2, 3.3, 3.5, 3.6, 3.8, 3.11, and 3.12). 5. Describe your approach to establishing and defining an SLA Support model and support execution based on the requirements outlined in the scope of work. Include examples that demonstrate your experience and expertise in each area. (Limit your responses to no more than 10 pages) (Section 3. Scope of Work, Subsections: 3.2, 3.3, 3.5, 3.6, 3.8, 3.11, and 3.12): a. Please provide a copy of the solutions standard Service Level Agreement (SLA) that has been used for a customer comparable to the CIPC. b. Please provide a sample of a regular SLA report with service requests, incident reports, downtimes, etc. c. Provide a minimum of three support models with associated pricing of each (i.e., 24x7x365, business hours vs. non-business hours of technical support). Include response timeframe(s) and provide the costs on a yearly basis for a total of three years.						**20**	

	6. What is your approach to project management? Please describe how your team would approach this engagement based upon the requirements provided. Include your approach to the required project management plan, communication strategy, approach to project schedule management, governance structure, and approach to risk management. (Limit your responses to no more than 5 pages) (Section 3. Scope of Work, Subsections: 3.2, 3.3, 3.5, 3.6, 3.8, 3.11, and 3.12). ***Ratings to be awarded as follows:*** 1. **Score = 1** - No Implementation Road Map/Project Plan provided. 2. **Score = 2** - Insufficient implementation road map with no design and no maintenance plan. 3. **Score = 3** - Basic, but complete response. Provides a detailed road map and addresses most (4-5) of the core criteria (1-6) (Scalability/Performance, Deliverables/Activities, Use Cases, Stakeholder Alignment, SLA/Support, and Project Management), but responses are often high-level, lacking explicit timeframes, best practices, or specific documentation (e.g., sample SLAs/reports). (Meets basic requirements across core implementation pillars.) 4. **Score = 4** - Strong, comprehensive response. Clearly addresses all six core criteria (1-6). Responses include detailed plans for design, project management, and rollout, PLUS a detailed maintenance and support plan. Timeframes, tools, and best practices are mentioned but may lack the deep specificity required for Score 5. (Strong plan addressing both delivery and operation.) 5. **Score = 5** - Exceptional and fully complete response. Addresses all six core criteria (1-6) with best practices in designs, includes a detailed project management plan, a detailed rollout plan with specific timeframes, detailed maintenance and support (including SLAs and Handover), PLUS explicit tools and techniques for all phases, and provides all required documentation (SLAs, pricing, sample reports, etc.). (Exceptional, actionable, and mature plan across all implementation and operational domains.) **NB: The Project plan must entail ALL requirements**							

No	EVALUATION CRITERIA	Rating					Weight %	Total
		1	2	3	4	5		
4.	**REFERENCE CHECKS** ❖ Bidders must have completed a minimum of two successful implementations of large-scale EDMG projects of similar size to the Companies and Intellectual Property Commission, that included data discovery, data lineage, automated data quality profile and assessments, and data governance workflow and framework support. 1. Provide a minimum of two (2) contactable references with detailed examples of completed and successful similar projects (size of customer and scope of work) that demonstrates your experience delivering upon the requirements included in this solicitation. Please include details like modules delivered, specific connectors used (base and extended) to integrate to the client's data assets, the volume of data assets in scope, project duration, KPIs, and business benefits, among other key details. (Limit your responses to no more than 5 pages) (Section 3. Scope of Work): a. Your approach to the project and key deliverables you were responsible for.						**10**	

	b. The outcome of the project as it relates to the project goals. c. Any other context you are willing to provide that demonstrates your experience related to the requirements of this solicitation. ***Ratings to be awarded as follows:*** **1. Score = 1** - No reference letters of completed projects effectively. **2. Score = 2** - Only one reference letters of completed projects partnership **3. Score = 3** - Two reference letters of completed projects **4. Score = 4** - Three to Five reference letters of completed projects. **5. Score = 5** - Six to Ten reference letters of completed projects **References must be South African and not international; they must be properly dated.**							
5.	**TECHNICAL CERTIFICATION** **Organizational/OEM Certification:** ❖ The bidders must attach OEM Technical Certification for the proposed solution—a minimum of 2 relevant certifications are required. These certifications must prove the organization is recognized by the vendor as technically proficient in the proposed Enterprise Data Management & Governance (EDMG) solution **Technical Resource Certification:** ❖ The bidders must attach a minimum of 2 CVs of resources to be involved in the project, plus a copy of the OEM Technical Certification for each of these Technical Resources related to the proposed EDMG solution. ***Ratings to be awarded as follows:*** ***1.* Score 1** = Attached CV's +No Data Management Certification ***2.* Score 2** = Attached CV's + only one Data Management Certification ***3.* Score 3** =Attached CV's + two Data Management Certification ***4.* Score 4** =Attached CV's + three Data Management Certification ***5.* Score 5** = Attached CV's + 4 Advanced Data Management Certification (CDMP, CIMP DGSP, CDPSE, DAMA-DMBOK, etc.) **Certifications must be relevant to the proposed solutions.**						**10**	
	Total						**100**	

Functionality / quality will be evaluated on a scale of 1 – 5 in accordance with the criteria below. The rating will be as follows: 1 = Very poor/ No experience, 2 = Poor/ 1-2 years' experience, 3 = Good / 2-3 years' experience, 4 = Very good 4-5 years' experience, 5 = Excellent 5 or more years.

Note:

1. Functionality will count out of 100 points. Bidders must achieve a minimum score of **60 points out of 100** on the functionality evaluation to proceed to the next phase.
2. **BIDDERS THAT ACHIEVE LESS THAN 60 POINTS ON FUNCTIONALITY WILL BE DISQUALIFIED FOR FURTHER EVALUATION**

15.5. PHASE 4: PRICING AND PREFERENTIAL PROCUREMENT POLICY

Preferential Procurement Policy

The bidders that have successfully progressed will be evaluated in accordance with the **80/20** preference point system contemplated contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000) as amended together with Preferential Procurement Regulations, 2022

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:

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. 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. ***Note:*** ***Bidders to submit valid and compliant B-BBEE Certificate as well as the CSD report. The B-BBEE Certificate is used as our primary verification document to claim points for specific goals for this bid. Failure to submit a compliant B-BBEE certificate will result in disqualification.***

2. The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser

#	Specific goals allocated points	Means of verification and Required Evidence	Preference Points (80/20)
1	***HDI, Race are black persons (ownership)**** *100% black ownership* *= 10 points* *and based on percentage pro rata for black ownership less than 100%* *eg: 67% = 6.7 points*	• B-BBEE Certificate • CSD Registration report • CIPC Company Registration *Important the CSD will be used as our primary verification documents*	**10**
2	***Gender are women (ownership)**** *100% or more women ownership = 8 points* *and based on percentage pro rata for black ownership less than 100%* *eg: 50% = 4.0 points*	• B-BBEE Certificate • CSD Registration report • CIPC Company Registration *Important the CSD will be used as our primary verification documents*	**8**
3	***Disability are disabled persons (ownership)**** *WHO disability guideline* *100% ownership = 2 points* *and based on percentage pro rata for black ownership less than 100%* *eg: 50% = 1.0 points*	• Confirmation of Disability Form as per SARS (ITRDD Form) •Medical Certificate *Important the CSD will be used as our primary verification documents*	**2**

3. ***Important***: ***Bidders to submit valid and compliant B-BBEE Certificate as well as the CSD report. The B-BBEE Certificate the primary verification document to claim points for specific goals for this bid. Failure to submit a compliant B-BBEE certificate will result in disqualification.***

- Provide fixed price quotation for the duration of the contract
- Cost must be VAT inclusive and quoted in South African Rand
- Costing should be aligned with the project activities / project phases

The bidder with the highest score will be recommended as the successful service provider.

16. ANNEXURE "I"

BID PRICING SCHEDULE

THIS PAGE TO BE INCLUDED IN THE PRICE FOLDER AS WELL AS IN THE SEALED PRICE ENVELOP TOGETHER

WITH ALL OTHER PRICE DOCUMENTS AS LISTED BELOW

PRICE INSTRUCTIONS

No	PRICING INSTRUCTIONS: BIDDERS TO COMPLY WITH ALL REQUIREMENTS
1.	**Applicable Currency:** • All prices shall be quoted in South African Rand.
2.	**Completion of Pricing Schedule:** • Bidders shall complete the pricing schedule in full, inserting all the information required therein. • In addition to the pricing schedule in this bid document, bidders may prepare a more detailed pricing schedule should they wish to do so, and include this in their pricing proposal, provided that such additional pricing schedule is in line with the deliverables on the CIPC issued pricing schedule.
3.	**Applicability of Quoted Prices:** • **All quoted prices must remain firm for the duration of the contract,** unless stipulated otherwise in the special conditions of contract. • The condition must be stated in SBD3.3 • Bidders to note that price validity is one hundred and twenty days (120) days • The service provider must clearly indicate whether the price is firm or subject to the Statutory Wage Increase
4.	**Total Bid Cost:** • Prices quoted must include all applicable taxes including VAT, less all unconditional discounts, plus all costs to deliver the services and/or goods. • Note: Service providers will be responsible for all costs e.g. transportation for ALL activities associated with this bid. It is therefore the bidder's responsibility to ensure that all costs are included in the price proposal submitted to CIPC
6.	**Bid Price Calculation**: • Bidders to note that estimates of quantities are provided to allow for the calculation of a bid price that allows equal comparison between bidders.
8.	**Applicable SBD Document to be included in the USB as well as sealed Pricing envelop** 1. **THIS PRICING SCHEDULE (ANNEXURE ("I")** 2. **SDB 3.3: PRICING SCHEDULE** 3. **SBD FORM 1: INVITATION TO BIDS FOR** 4. **A BIDDER *MUST* ATTACH PRICE BREAKDOWN IN THE BIDDER'S COMPANY LETTERHEAD SIGNED BY AUTHORISED REPRESENTATIVE**

FAILURE TO COMPLY WITH ALL THE ABOVE REQUIREMENTS FOR PRICING SHALL IMMEDIATELY INVALIDATE THE BID

FURTHER PRICE INSTRUCTIONS FOR BIDDERS
1. RFP Solicitation Requirements provides a detailed list of the requirements that the Contractor must adhere to. Bidders must include the cost for the deliverables listed under each phase and ongoing support and maintenance services.
2. There are five (5) tabs in addition to the Instructions tab. Bidder is to complete each tab per the Completion Instructions.
3. For each tab, fill in only the cells that are applicable to your proposal. If needed, insert lines for additional costs, but do not delete any lines.

Table #	Table Name	Completion Instructions
1	**Project Phases (Deliverables) Cost**	1. The Bidder's will incorporate exact pricing proposal for the Discovery phase of this engagement based on the requirements provided in the Discovery, Research, and Strategy Phase Requirements Phase of the Scope of Work. • The Bidder must account for the minimum deliverable requirements requested, in addition to any other activities or deliverables you may propose to accomplish the goals outlined for this engagement. Additional activities or recommended requirements must include a clear description and business case for inclusion in your proposal. 2. The Bidder's shall provide estimated prices for all subsequent phases of this engagement. The Bidder must consider the requirements outlined in all phases of this Scope of Work to provide their best estimated price for all phases, and therefore a total cost of the engagement. 3. Bidders are responsible for ensuring that all totals are mathematically accurate. "Deliverables Cost" includes the project deliverables, tasks and professional services costs associated with each phase of the project.
2	**Software Costs**	• This tab must reflect all costs extending beyond the completion of the implementation project, recurring License Pricing (including SaaS), and recurring Hosting/Infrastructure Pricing. Bidders are responsible for ensuring that all totals are mathematically accurate.
3	**As and when needed Services**	At some point after the initial use cases are configured, under this contract, the CIPC may elect to expand solution capabilities and on-board additional departments into the identified solution. Historically, staff augmentation has been required to accomplish these objectives. In the Price Proposal, please clearly outline the position title, duties, and hourly salary required to provide staff augmentation. Identify whether these staff resources will be provided through your company or a business partner.
4.	**Key Assumptions**	Bidders must indicate all assumptions upon which the pricing proposal is based. Please also include any additional comments to help contextualize the assumptions, and how changes to the assumptions may impact pricing.
5.	**Total Bid Price (Ceiling)**	This amount for this table must be carried over to SBD 3.3 and SBD form 1- This will be used for evaluation.

TABLE 1: **PROJECT PHASES (DELIVERABLES) COST*: must be completed by bidders***

No.	Deliverables Costs	
1.	**Planning and Discovery**	**Price**
	Project Charter	**R**
	Project Plan and Organizational Chart	**R**
	Detailed Requirements Document	**R**
	Total	**R**

2.	**Solution Design Phase**	**Price**
	High-level architecture and system design documents	**R**
	Data governance framework tailored to the CIPC's policies and needs	**R**
	Complete all security documents	**R**
	Total	**R**

3.	**Solution Configuration and Implementation Phase**	**Price**
	Configuration of Core Modules	**R**
	Data Migration	**R**
	CIPC Core Use Cases (CCUC)	**R**
	Total	**R**

4.	**Software Installation**	**Price**
	Provide infrastructure diagrams and documentation for installation.	**R**
	Install fully functional production and non-production environments.	**R**
	Confirm the operation and functionality of the installed components.	**R**
	Total	**R**

5.	Testing and Validation Phase	Price
	Provide a testing overview and educational session for CIPC test participants.	R
	Identify and develop test scenarios for each use case. provide a detailed Test Plan, covering all aspects of testing (unit, system, integration, performance, and user acceptance testing). The Test Plan should also define test cases, success criteria, and test data requirements.	R
	Define and create a feedback submission process. Implement a defect tracking system to log, prioritize, and resolve issues identified during testing. All defects must be documented, categorized (e.g., critical, major, minor), and addressed in a timely manner.	R
	Present test findings to CIPC stakeholders to prioritize remediation and/or enhancement activities.	R
	Total	**R**

6.	Training	Price
	A training syllabus and plan that proposes the training courses to be delivered to the CIPC based on the future governance and organizational model. Include all details of the EDMG solution to enable successful operation and management of the system and each of its components throughout its useful life.	R
	Provide training to the CIPC's project team, departmental users (data liaisons), and other identified stakeholders to understand any changes to their current workflows and how to request support services from the support provider	R
	Total	**R -**

7.	Go-live/release process	Price
	Go-live checklist and detailed day-of launch plan to ensure alignment and commitment from all stakeholders and responsible parties	R
	RACI Roles and responsibilities for deployment. Outline process for transitioning to maintenance.	R
	Total	**R -**

8.	Maintenance	Price
	Provide a Service Level Agreement (SLA) support model definition to include items "a" through "m" listed under "G. Maintenance", subsection "3.8 Implementation Service Requirements" of the Scope of Work.	R
	Provide the maintenance cost for the proposed solution modules	R
	Total	**R -**

Total Deliverables Costs	R -

TABLE 2: SOFTWARE COSTS

Software Assumptions
Bidders, at a minimum, must include the following in their software costs: • Unlimited plug-n-play connectors, extensions, open API, and SDK framework along with a suite of file import templates • Minimum of 5 privileged users (Write and Edit permissions) • Unlimited Business Users (Read-Only)

Software Costs								
Item #	**Software Item**	**Per Unit Cost**	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Total Item Cost**
1	Item 1		**No cost to be provided, since the software will not go live during Year 1 of the Contract**	**R**	**R**	**R**	**R**	**R**
2	Item 2			**R**	**R**	**R**	**R**	**R**
3	Item 3			**R**	**R**	**R**	**R**	**R**
4	Item 4			**R**	**R**	**R**	**R**	**R**
	Add additional rows/deliverables as required			**R**	**R**	**R**	**R**	**R**
							Total Software Cost	**R**

TABLE 3: AS AND WHEN REQUIRED SERVICES

- **Must be included in the total bid price**

Hourly Rates for In-House as Needed Additional Maintenance and/or Enhancement Services				
Item No.	**Title**	**Qty**	**Maximum Hours (Per Resource)**	**Amount**
1	Frontend Developer	1	1000	
2	Junior Software Developer	1	1000	
3	User Interface Designer	1	1000	
4	Senior Developer	1	1000	
5	Software Developer	1	1000	
6	Web Developer	1	1000	
7	Project Manager	1	1000	
8	Quality Assurance Engineer	1	1000	
9	Data Analyst	1	1000	
		TOTAL AMOUNT HOURLY RATES FOR IN-HOUSE		

TABLE 4: KEY ASSUMPTIONS

- **Must be included in the total bid price. Detailed explanation must be provided**

Cost Assumptions				
Item #	**Proposal Section, Page, Paragraph**	**Description**	**Rationale**	**Cost Impact if the Assumption is Invalid**
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

TABLE 5: TOTAL BID PRICE

TOTAL BID PRICE (CEILING PRICE) FOR THE DURATION OF 5 YEARS: I. NB: this table must be inclusive of the price *for all 4 tables above and all requirements of the TOR* *II. this total price must be carried over to SBD3.3 and SBD form 1* *III. The total (Ceiling) price will be used to evaluate bids in Phase 4*		
TO BE CARRIED OVER TO SBD 3.3 AND SBD FORM 1	*TOTAL AMOUNT FOR 5 YEARS*	
	AMOUNT EXCLUDING VAT	
	VAT AMOUNT	
	TOTAL AMOUNT INCLUSIVE OF VAT	

FAILURE TO COMPLY WITH ALL THE ABOVE REQUIREMENTS FOR COSTING SHALL IMMEDIATELY INVALIDATE THE BID.

17. ANNEXURE "J" - Security and Privacy Maturity Questionnaire

Instructions
• The Information Assurance (IA) is conducting due diligence to gather information and assess [BIDDER NAME]'s current data security policies, processes, and practices. The purpose of this questionnaire is to assess the current maturity of a security program implemented across a vendor organization (i.e., the Bidders) that offers a product or service to the CIPC, e.g., an information system or industrial control system solution. This questionnaire is derived from the National Institute of Standards and Technology (NIST) Cybersecurity Framework (CSF) and the Center for Internet Security (CIS) to identify areas of cybersecurity risk and can be applied to cover systems and software hosted either on-premise or by a Cloud Service Provider (CSP). - On-premise hosting features data center resources owned by an organization. - A CSP is a third-party company that provides scalable computing resources that organizations can access on demand over a network, including cloud-based computing, storage, platform, and application services.
• For each question, the Bidders identifies if the question is satisfied based on the following options: Not Performed: Non-existent Practices. Risk management practices not implemented or executed in any form. • Performed Informally: Ad Hoc Practices. Risk management practices implemented on an informal or ad hoc basis, without defined processes or documentation. The implementation may vary depending on individual practices or preferences, but there is no standardized approach. • Planned & Tracked: Requirements-Driven Practices. Risk management practices recognized as important, and efforts are made to plan and track its implementation. There is a defined strategy or action plan, although it may not be fully formalized or consistently followed. • Well Defined: Organization-Wide Standardization. Risk management practices are well-defined, documented, and consistently applied across the organization. Depending on the responses, the team ISO may have follow-up questions. Note: Questions regarding the maturity of the current privacy program are to be completed by the Department.
If the CIPC has requested related documentation by indicating "Yes" in the "Documentation Requested" column, please provide copies of any existing relevant documentation with your questionnaire response. If the Bidder chooses not to provide requested documentation, please provide an explanation in the comments.

ANNEXURE "J" -SECURITY MATURITY QUESTIONNAIRE (BIDDER)				
Control Area	**NIST Cybersecurity Framework Subcategory**	**Question**	**Response (This form cannot be used to provide responses.)**	**Documentation Requested**
Asset Management	ID.AM-1	Does the Bidder inventory its physical devices and systems?		
	ID.AM-2	Does the Bidder inventory its software platforms and applications, which includes any risks that each third-party component could pose?		
	ID.AM-5	Does the Bidder prioritize resources at the Bidder, such as hardware, devices, data, time, personnel, or software, according to their classification, criticality, and business value?		
Governance	ID. GV-4	Do the Bidder's governance and risk management processes address cybersecurity risks?		
Risk Assessment	ID.RA-5	Does the Bidder use threats, vulnerabilities, likelihoods, and impacts to determine risk?		
Risk Management Strategy	ID.RM-1	Are risk management processes established, managed, and agreed to by organizational stakeholders?		
Supply Chain Risk Management	ID.SC-4	Does the Bidder routinely assess suppliers and third-party partners using audits, test results, or other forms of evaluations to confirm that they are meeting their contractual obligations?		Yes, please provide bidder SOC 2 Type 2 report or equivalent
Identity Management, Authentication, and Access Control	PR.AC-1	Does the Bidder issue, manage, verify, revoke, and audit identities and credentials for authorized devices, users, and processes?		
	PR.AC-3	Does the Bidder manage remote access?		
	PR.AC-4	Does the Bidder manage access permissions and authorizations incorporating the principles of least privilege and separation of duties?		
	PR.AC-5	Does the Bidder protect network integrity (for example, by incorporating network segregation or network segmentation where appropriate)?		
	PR.AC-7	Does the Bidder authenticate users, devices, and other assets with mechanisms (for example, single-factor or multifactor authentication) that are commensurate with the risk of the transaction (for example, individuals' security and privacy risks and other organizational risks)?		
Data Security	PR.DS-1	Does the Bidder encrypt data-at-rest?		
	PR.DS-2	Does the Bidder encrypt data-in-transit?		
	PR.DS-3	Does the Bidder formally manage assets throughout removal, transfers, and disposition?		
	PR.DS-5	Does the Bidder implement protections against data leaks?		
Information Protection Processes and Procedures	PR. IP-1	Has the Bidder created, and does it maintain a baseline configuration of information technology and industrial control systems incorporating security principles (for example, the concept of least functionality)?		
	PR. IP-2	Has the Bidder implemented a system development life cycle, or process for planning, developing, testing, and deploying information systems?		
	PR. IP-6	Does the Bidder destroy data according to policy?		
	PR. IP-11	Does the Bidder include cybersecurity activities, such as deprovisioning or personnel screening, in its human resources practices?		
Protective Technology	PR.PT-2	Does the Bidder protect and restrict use of removable media according to its policy?		
Anomalies and Events	DE.AE-1	Has the Bidder established, and does it manage a baseline of network operations and expected data flows for users and systems?		Yes, please provide user and system data flows
Security Continuous Monitoring	DE.CM-7	Does the Bidder monitor for unauthorized personnel, connections, devices, and software?		
Response Planning	RS.RP-1	Does the Bidder execute a response plan during or after an incident?		
Recovery Planning	RC.RP-1	Does the Bidder execute a recovery plan during or after an incident?		

18. *ANNEXURE "K"* - Functional and Technical Requirements

INSTRUCTIONS TO BIDDERS BELOW

- **This Attachment contains Functional Requirements requested for the EDMG Solution for the Business Intelligence Systems Group Department. Note that any requirement that contains "etc." is to be interpreted as at a minimum the requirement shall include.**

- **Instructions: The table below lists the fields and instructions by field within the "Functional Requirements" table. Fill out the Bidders Response field and the Bidder Comment field located in the "Functional Requirements" tab as instructed in the table below.**

  Additionally note:

  - **An omitted response will be assumed to be the same as a response code of "N"**
  - **Only one response per requirement will be accepted**
  - **Bidders must insert an explanation for how a requirement will be met in the Bidder Comment column when responding with a code of "O" If Bidders do not provide a comment when explicitly requested, the requirement will be given the lowest evaluation score. Bidder responses with code "N" shall include an explanation of any customizations or third-party integrations to provide the functionality, if applicable.**

Rows highlighted in Blue are the CIPC's Core Use Cases.

Field	Definitions/Instructions
ReqID	**Requirement Identification Number**: This is the ID to use to refer to requirements in correspondence. **DO NOT EDIT THIS FIELD**
Capability	Specifies the requirement category

	DO NOT EDIT THIS FIELD
Requirement	Specifies the details of the requirement **DO NOT EDIT THIS FIELD**
Bidder Response	Bidder's response to whether and how the technical requirement will be met. Indicate how the requirement as written will be met by Bidder using the following codes: Bidder Response Definitions: **O** - Out of the box - the requirement can be met out of the box **N** - No - the requirement cannot be met out of the box
Bidder Comment	A Bidder comment is required when the response is O.
Rows Highlighted in Blue	A Bidder comment is required when the response is O.

Additional Details for the Bidder Response field (Column of the Functional Requirements table)			
Response Option	**Bidder Functionality**	**Definition**	**Additional Notes**
O	Functionality provided as standard	Bidder provides the functionality from its own code base (i.e., 'out of the box'). No customizing, working around, or configuration is required. The functionality must be installed and operational at other sites and be able to be demonstrated to PMC.	For this response option, Bidder must indicate the following in the Bidder Comment column next to this response: description of the out of the box configuration and relevant product documentation links supporting the response.
N	Functionality not proposed	Not included in the proposed Solution.	Bidder responses with code "N" shall include an explanation of any customizations or third-party integrations to provide the functionality, if applicable.

ANNEXURE "K" "*Continuation*" :Functional Requirements

ReqID	Capability	Requirement	Bidder Response	Bidder Comment (Required when Bidder response is O.
1	**Data Discovery /Catalog**	**Provides ability to connect to, scan, and automatically extract the most granular metadata from data assets contained in relational database management system (RDBMS), procedural and scripting code, hosted BI/reporting environments, cloud environments, and spatial applications.**		
2	Data Discovery /Catalog	Provides unlimited metadata ingestion through plug-n-play connectors, extensions, open API, and SDK framework along with a suite of file import templates.		
3	Data Discovery /Catalog	Provides insights into data uses such as reporting and/or metrics.		
4	Data Discovery /Catalog	Provides customizable dashboard views.		
5	Data Discovery /Catalog	Provides drill downs into key data catalog attributes such as sensitive data, top data sources, data lineage and operational elements.		
6	Data Discovery /Catalog	Provides the currency of data or date when it was last updated/modified.		
7	Data Discovery /Catalog	Provides ability to store and display data owners per data asset.		
8	Data Discovery /Catalog	Provides a display of CIPC users with access to the data assets and the last date of access.		
9	Data Discovery /Catalog	Provides impact assessment for data changes (type, length, name, etc).		
10	Data Discovery /Catalog	Provides ability to flag data fit for public release.		
11	Data Discovery /Catalog	Provides a semantic layer.		
12	Data Discovery /Catalog	Provides ability to flag reference/master data codes enterprise wide and by business domains.		
13	Data Discovery /Catalog	Provides data certification tags/management.		

14	Data Discovery /Catalog	Provides auto detection of sensitive data (PII, PHI and PCI) and recommend actions, risk ratings, and enables data elements to be manually classified or flagged as sensitive.		
15	Data Discovery /Catalog	Provides data insights by leveraging machine learning (ML), artificial intelligence (AI), and natural language processing (NLP).		
16	**Data Lineage**	**Evaluate the tool's ability to track data lineage and profile data for quality assessment.**		
17	Data Lineage	Natively generates data lineage for any data asset field / column from the source system all the way to the final target regardless of the target technology (database table, application, dashboard, etc.).		
18	Data Lineage	Provides interactive and drillable lineage diagram that provides optics at the component and object levels for risk and impact assessments for changes.		
19	Data Lineage	Provides Intuitive search capability for each data element (column).		
20	Data Lineage	Provides depiction and diagram data lineage from source to reporting layers, including all transformations in an easy-to-understand interface for both the business and technical perspectives.		
21	Data Lineage	Provides easy-to-understand pre-built views/reports of all potential upstream or downstream impacts of a change at a column, table or report level.		
22	**Automated Data Quality Profile and Assessments / Master Data Management**	**Automatically profile and assess or score the data quality of the following data asset types and sense and classify reference/master data: Spatial database tables and non-spatial database tables.**		
23	Automated Data Quality Profile and Assessments / Master Data Management	Provides a scheduler that automatically profiles and assesses data quality of all data assets (dataset, table and/or field level) based on configurable rules.		

24	Automated Data Quality Profile and Assessments / Master Data Management	Provides data profiling and data assessments with details and metrics alongside metadata details for easy visibility and understanding.		
25	Automated Data Quality Profile and Assessments / Master Data Management	Provides auto generation of suggested data quality rules and assessment algorithms. This functionality is needed as an input into future data prioritization and governance workflows such as certifying data for public and/or internal use.		
26	Automated Data Quality Profile and Assessments / Master Data Management	Provides ability to cleanse, match, link, identify, and reconcile master data in different data sources to create and maintain the "golden record".		
27	Automated Data Quality Profile and Assessments / Master Data Management	Stores and distributes reference data created externally. Examples of reference data: county, currency, codes, administrative regions, etc.		
28	Automated Data Quality Profile and Assessments / Master Data Management	Manages different types of master data (person, product, etc.) inside the same platform.		
29	Automated Data Quality Profile and Assessments / Master Data Management	Creates and maintains hierarchical constructs/models used by the business to aggregate information for reporting and analytics.		
30	Automated Data Quality Profile and Assessments / Master Data Management	Manages relationships across entity instances within the same entity class, as well as across entity classes.		

31	Automated Data Quality Profile and Assessments / Master Data Management	Identifies records in a dataset that refer to the same entity across different data sources.		
32	Automated Data Quality Profile and Assessments / Master Data Management	Resolves duplicate representation of the same entity instance based on a set of defined attribute/rules and assign unique identifier for each instance.		
33	Automated Data Quality Profile and Assessments / Master Data Management	Enables data stewards to monitor data quality and recommend and track remediation actions.		
34	**Data Governance Workflow and Framework Support**	**Generate and execute an integrated workflow to automate data value validation and loading of data.**		
35	**Data Governance Workflow and Framework Support**	**Generate and execute a workflow that auto generates business glossary terms (using AI or equivalent) for configured data catalog items and allows an approver to accept with no change, accept with changes or reject the result on a field basis along with a full audit trail attached to the data asset.**		
36	**Data Governance Workflow and Framework Support**	**Generate and execute a workflow to standardize data assets with South African address values and auto detect data assets in the catalog to attach the policy to.**		
37	**Data Governance Workflow and Framework Support**	**Generate and execute a workflow to automatically discover all catalog items containing sensitive information and flag the items.**		
38	**Data Governance Workflow and Framework Support**	**Generate and execute a workflow to automatically discover all catalog items containing non-sensitive information and flag the items as eligible for open data and allows an approval process to accept or reject the designation.**		

39	**Data Governance Workflow and Framework Support**	**Generate and execute a workflow to automatically discover high value data assets.**		
40	**Data Governance Workflow and Framework Support**	**Generate and execute a workflow to automatically discover high risk data assets.**		
41	Data Governance Workflow and Framework Support	Provides enrichment of the data catalog with a business glossary (definition of data assets in business terms), creation, configuration and attachment of relevant policies, standards, regulations, and other data governance rules		
42	Data Governance Workflow and Framework Support	Finds and classifies sensitive data (Personally Identifiable Information (PII), Protection of Personal Information Act (POPIA), GDPR (General Data Protection Regulation),NIST Cybersecurity Framework (CSF),and Payment Card Industry Data Security Standard (PCI), among others). Leveraging AI and ML to speed deployment.		
43	Data Governance Workflow and Framework Support	Audits and monitors data assets in real-time, for data governance compliance through rules-based configuration. Pre-built data governance audit/compliance risk-reduction workflows that highlight the distribution of data are highly desired.		
44	Data Governance Workflow and Framework Support	Automates data security monitoring of sensitive data showing usage and permissions heatmaps to identify data and systems that are at risk of security exposure. Enable the configuration of alerts to data owners based on risk criteria.		
45	Data Governance Workflow and Framework Support	Enables automated workflows to capture issues/needs, actions and resolution at the data asset level to streamline data governance tasks such as data access or sharing requests, open data release, compliance audits, and policy changes.		
46	Data Governance Workflow and Framework Support	Tracks data access and changes.		

47	Data Governance Workflow and Framework Support	Automates version management and change control. Version all metadata and related mappings and provide change comparison reports to support audits and impact analysis.		
48	Data Governance Workflow and Framework Support	Classifies generative AI and ML data outputs and manage related model inputs and outputs.		
49	Data Governance Workflow and Framework Support	Provides auto-glossary suggestions to reduce manual work of linking glossary terms to each data table.		
50	Data Governance Workflow and Framework Support	Provides ability to collaborate with stakeholders involved in governance activities using embedded integration with collaboration tools to make metadata accessible in native workflows and tools.		
51	**General Technology Requirements**	Solution provides a clear and easy method to search and navigate site content which will enable users to get to their desired information as efficiently as possible.		
52	General Technology Requirements	Solution adheres to best practices and addresses all regulatory and compliance obligations related to data.		
53	General Technology Requirements	Solution is highly scalable (keeps up with ever increasing volumes of data asset demands).		
54	General Technology Requirements	Solution provides capability to scan/process a large volume of data assets (1M+ objects) across different technologies on a regularly cadence with no loss of performance to source systems and applications.		
55	General Technology Requirements	Solution provides 99.99% availability and redundancy so that patching and maintenance will be done with zero downtime and with failover to an alternate site while maintenance takes place on one site.		
56	General Technology Requirements	Solution ensures existing systems and applications perform optimally in the new, re-designed environment.		

57	General Requirements	Technology	Solution integrates with the CIPC's Active Directory and Single Sign On (SSO) for user account management.		
58	General Requirements	Technology	Solution integrates with Microsoft Power BI (enterprise reporting tool), and Oracle Data Integrator / Microsoft SSIS / Azure Data Factory (enterprise ETL tool).		
59	General Requirements	Technology	Solution is highly secure and adhere to all CIPC requirements: SOC 2 compliant, encryption of data in transit, and encryption of data at rest.		
60	General Requirements	Technology	Solution complies with the CIPC's Cloud Computing/Security Policy (ISP200-202), as may be amended if cloud-based.		
61	General Requirements	Technology	Solution and any processing functionality are housed in the continental United States.		
62	General Requirements	Technology	Solution includes role-based access control (RBAC) to enable managing who has access to resources, what actions they can perform, and which areas they can access. While default roles should exist based on best practices, the solution must also support creation of custom roles and permissions as needed.		
63	General Requirements	Technology	Solution ensures any associated data remains the sole property of the CIPC and will not be shared with any third party (without written consent from the CIPC). This includes but is not limited to metadata and usage statistics.		

ANNEXURE "K" "Continuation": Technical Requirements

ReqID	Capability	Requirement	Bidder Response	Bidder Comment (Required when Bidder response is O.
1	Data Connectivity and Integration	The EDMG solution must enable seamless connectivity and data integration across all identified data sources, supporting both real-time and batch processing.		
2	Scalability and Performance			
3	Data Security and Compliance	The EDMG solution must ensure data security through encryption, access controls, and audit logging to meet regulatory and organizational compliance standards.		
4	Metadata Management and Cataloging	The solution must automatically catalog and manage metadata across connected data sources, supporting organization-wide discoverability and governance.		
5	Data Quality Management and Monitoring	The solution must automatically assess, profile, and score data quality, alerting stakeholders to issues that fall below defined thresholds.		
6	Data Collaboration and Democratization	The solution must support business users from different departments to easily share and collaborate on data related to the priority domains. Data communities or forums enable knowledge sharing and discussion around data governance initiatives. The solution must also facilitate self-service access to data, empowering business users to explore and analyse data independently.		
7	Workflow	The solution must support configurable workflows that automate data validation, governance, and approval processes for improved data governance.		
8	Master Data Management	The EDMG solution must provide tools for managing and synchronizing master data to ensure consistency across all data domains.		

9	Impact Analysis and Change Management	The EDMG solution must enable impact analysis to assess the potential consequences of changes to data assets or systems within the priority domains and support versioning and change tracking for data assets		
10	Service Level Requirements	The solution must meet agreed service level objectives, including availability, response time, and support responsiveness, to maintain uninterrupted operations.		
11	Reporting and Analytics	The solution must offer robust reporting and analytics capabilities, enabling users to generate insights and track data management metrics.		
12	Hosting	The solution must be able to be hosted on cloud or on premises. (Preferable cloud based or hybrid solution)		
13	Configurability	The EDMG solution must allow configuration to meet organizational needs without requiring extensive custom development.		

19. BRIEFING SESSION

PLEASE NOTE THAT THERE IS *A COMPULSORY* BRIEFING SESSION SCHEDULED FOR THIS.

COMPULSORY	**SITE VISIT / BRIEFING SESSION**
DATE:	**17 NOVEMBER 2025**
TIME	**11:00 AM**
VENUE	**BLOCK -D BLOCK-D0G-DG14; THE DTI" CAMPUS, 77 MEINTJIES STREET, SUNNYSIDE PRETORIA**
MANDATORY IN-PERSON BRIEFING SESSION AT THE CIPC OFFICE ***DURING THIS SESSION A TECHNICAL PANEL OF THE CIPC WILL OUTLINE THE SCOPE OF THE PROJECT AND WILL ADDRESS QUESTIONS FROM PROSPECTIVE BIDDERS.***	
IMPORTANT NOTE TO BIDDERS: -	***This is a compulsory briefing session,*** **FAILURE TO ATTEND IMMEDIATELY DISQUALIFIES YOUR BID**

20. SUBMISSION OF PROPOSALS

Sealed proposals will be received at the Tender Box at the main gate, 77 Mentjies Street, Sunnyside, **the DTIC** campus,

Proposals should be addressed to:

Manager (Supply Chain Management)

Companies and Intellectual Property Registration Office

the dtic Campus, 77 Meintjies Street,

Sunnyside

PRETORIA

20.1. ENQUIRIES

A. Supply Chain Enquiries

Ms Ntombi Maqhula OR Mr Solomon Motshweni

Contact No: (012) 394 3971 /45344

E-mail: Nmaqhula@cipc.co.za OR SMotshweni@cipc.co.za

B. Technical Enquiries

Mr Sello Ndhlovu –: E-mail: **sndhlovu@cipc.co.za**

Note : It is the bidder's responsibility to call CIPC if they have any questions that have not been answered via email, as the system may have flagged their email as spam.

20.2. DEADLINE FOR SUBMISSION

BIDS OPENING DATE: **29 OCTOBER 2025**

BIDS CLOSING TIME: **11: 00 AM**

COMPULSORY BRIEFING SESSION: **17 NOVEMBER 2025 @11H00am**

BIDS CLOSING DATE: **03 DECEMBER 2025**

BIDDERS MUST ENSURE THAT BIDS ARE DELIVERED IN TIME TO THE CORRECT ADDRESS. LATE PROPOSALS WILL NOT BE ACCEPTED FOR CONSIDERATION

NB: IT IS THE PROSPECTIVE BIDDERS' RESPONSIBILITY TO OBTAIN BID DOCUMENTS IN TIME SO AS TO ENSURE THAT RESPONSES REACH CIPC, TIMEOUSLY. CIPC SHALL NOT BE HELD RESPONSIBLE FOR DELAYS IN THE POSTAL SERVICES AND BIDS DEPOSITED IN THE INCORRECT BID BOX. BID PROPOSAL MUST BE HAND DELIVERED TO THE CIPC BID BOX AT THE DTIC MAIN GATE".AT 77 MEINTJIES STREET, SUNNYSIDE