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SOUTH AFRICAN SOCIAL SECURITY AGENCY

TERMS OF REFERENCE

REQUEST FOR PROPOSAL FROM SERVICE PROVIDERS TO PROCURE DEVICE MANAGEMENT, SECURITY, DATA PROTECTION & THEFT RECOVERY SOLUTION FOR A PERIOD OF FIVE (5) YEARS

Contents

1. BID OVERVIEW

1.1 OVERVIEW OF SASSA

The South African Social Security Agency (SASSA), listed as a schedule 3A public entity in terms of the PFMA, is an extension of government's delivery arm that administers the delivery of grants to the poor in South Africa. Through SASSA, government must ensure improvement of the social security service delivery system.

The Agency aims to deliver quality and comprehensive social security services in partnership with non-governmental, community-based, faith-based organisations, business, and civil society structures and labour movement.

The founding legislation of this entity, which is the South African Social Security Agency Act, 2004 was enacted at the beginning of 2004. The SASSA Act also makes provision for the effective management, administration and payment of social assistance and services through the establishment of the SA Social Security Agency.

The key functions of SASSA are the administration and payment of social grants and include:

a) The processing of applications for social grants;
b) Verification and approval of applications;
c) Ongoing entitlement reviews of Beneficiaries;
d) Disbursement and payment of grants to eligible beneficiaries; and
e) Quality service assurance ensuring compliance with norms and standards and fraud prevention and detection.

SASSA provides the following types of social grants:

a) Old Age;
b) War Veterans;
c) Disabled Persons;
d) Grant-in-Aid;
e) Child support;
f) Foster Care;
g) Social Relief;
h) Care Dependency;
i) As well as the correspondence related to these grants.

2. BACKGROUND INFORMATION

2.1. South African Social Security Agency, here-in referred to as the Agency, is in the process of procuring a Device Management, Security, Data Protection & Theft Recovery solution. This Terms of Reference (ToR) serves to solicit proposals to implement Device Management, Security, Data Protection & Theft Recovery solution (asset and device tracking tool) which encompasses Asset Inventory, Remote Data Protection, Theft Investigation and Recovery of its assets nationwide. Provided as a Managed Service (MSP).

2.2. The Agency requires a solution to tightly secure its computing infrastructure. Since end point devices are a significant point of failure as it relates to security policy, the Agency desires a solution to help increase management of these endpoint computing devices.

3. PREPARATION OF THE RESPONSES

3.1. It is imperative that the responses be prepared in line with instructions as set out in this bid document. Failure to do so will make the responses difficult or impractical to evaluate, and will thus be disqualified.

3.2. The following is work that must be included as in scope:

3.2.1. The licensed subscriptions of the solution spanning 5 years and incorporating all identified (4000) devices already within the infrastructure. The subscription license should be transferable from one device to another in case of an End of Life (EOL) of the asset.

3.2.2. An ongoing service to South African Social Security Agency as components of the software-as-a-service solution, specifically operation of the production data centre housing the monitoring servers and Service provider Customer Centre web portal, as well as the Technical Support Services and Recovery Services as required from time-to-time for the duration of the contract.

3.2.3. An option to use a Service Provider dedicated resource to help manage tracking, recovery and data destruction.

3.3. All mandatory requirements in the bid document are proceeded or marked with three asterisks (***). Bidders are to fully comply with the mandatory requirements/elements.

3.4. Failure to provide evidence of compliance to any of the mandatory requirements will result in the bid response being disqualified. Failure to meet this requirements will render the bid unsuccessful and not considered for Price and B-BBBEE Status.

3.5. Service Pricing must be completed on the attached **Annexure B – Service Pricing** Template.

NB: The mandatory requirements compliance checklist will be used to evaluate the bidders' proposals. The bidders can use the checklist as a guide of what mandatory elements will be evaluated for this bid and considered successful.

4. REQUIREMENTS SPECIFICATIONS

4.1. Device Assignment and Reporting

4.1.1. *** Device Management Service to adhere to asset audit and compliance specifications.

4.1.2. *** Persistent asset tracking technology to be activated on laptop/mobile devices.

4.1.3. ***Computer Serial number coupled to tamper proof electronic serial number (ESN) in the BIOS.

4.1.4. ***Cloud Asset Management platform integrated with persistent tracking technology providing single trusted source of asset inventory. Cloud barcode serial number scanning of device for stores, in-transit, and devices not connected.

4.1.5. ***Access Control, management of employee and guest devices movement in and out of South African Social Security Agency buildings in the Cloud Console.

4.1.6. ***Audit and Procurement verification integrated service to verify asset assignment to employee and department. Verification by scanning procured devices against Purchase Order (PO) and storeroom management.

4.2. Configuration Management And Variance Reporting

4.2.1. *** Service Function to execute Scripts remotely to a specific group or subset of devices from a library of predefined scripts.

4.2.2. *** Reporting on Software that is not approved by the Agency.

4.2.3. *** The device performance such as used vs remaining space on Disk Drive and Random Access Memory (RAM) along with usage of the device.

4.3. Lost And Stolen Devices

4.3.1. *** Physical location of all devices managed and the ability to ring fence all, subset or specific devices to control movement thereof.

4.3.2. *** System to identify and manage a device which is lost or stolen.

4.3.3. *** Stolen device must have data remotely deleted and proof of data removal.

4.3.4. *** Reporting of stolen devices and the global recovery thereof.

4.4. Additional Requirements

4.4.1. The bidder must submit the following as part of the bid:

    4.4.1.1. ***The single point of contact (project manager), who will be responsible for the delivery, full installation and configuration of the Asset and Device Tracking solution. The single point of contact (project manager) must have the following qualifications and experience:

        4.4.1.1.1. ***Projects in Controlled Environments (PRINCE) 2 or Project Management Body of Knowledge (PMBOK).

        4.4.1.1.2. ***Four (4) or more years work experience in project management.

4.4.2. ***A contractual agreement, with clear deliverables and timeframes will be signed with the successful bidder upon award of the bid.

4.4.3. The successful bidder must install and configure the Asset and Device Tracking solution in accordance to the South African Social Security Agency requirements and will be required to work with and provide feedback to the relevant officials from the South African Social Security Agency during installation and configuration.

4.4.4. ***The installation and configuration must be signed-off by the relevant OEM officials and provide assurance to the South African Social Security Agency officials upon completion thereof. The OEM should confirm that the warranty is not voided after implementation of the Asset and Device Tracking solution.

4.4.5. ***The bidder must provide a confirmation letter from OEM being a value added partner. The letter should have valid contact details of the OEM.

4.4.6. ***SASSA seeks a solution that will be able to host its data within the South African borders in compliance with the POPI Act.

4.4.7. **Evidence of product code specifically stating NETSEC-NAM-MSP-GOV-60.

5. TECHNICAL FEATURES FOR INCLUSION

5.1. Asset Administration

5.1.1. The tool must provide an easy to use and cost-effective interface to maintain accurate endpoint device inventory data throughout the life-cycle of the endpoint within South African Social Security Agency through integration of the proposed tracking technology.

5.1.2. This must include but not limited to storeroom management, asset assignment to user and department, access control, mobile scanning application.

5.1.3. Integration capability of Asset Register and User information into a cloud-based management consol.

5.1.4. Retain a complete asset event history ensuring live and current auditing of devices in the South African Social Security Agency environment adhering to the PFMA and AGSA requirements.

5.2. Data & Device Security

5.2.1. Sensitive data being intellectual property of the Agency must be protected at all times, and hence the solution must have the capability to be accessed remotely and safeguarded if data is at risk.

5.2.2. Data that is end of life needs to be wiped so that it is not accessible for any purpose and Audit logs and lifecycle certificates should be accessible for proof of data wipe process.

5.3. Geo-technology

5.3.1. Being able to track and trace, set physical locations can limit movement creating controls of moveable assets.

5.3.2. Tracking of assets over the internet map.

5.3.3. The ability to build geo-fences ensuring devices are only allowed within a vicinity and creating alerts if device moves out of the secure vicinity.

5.4. Endpoint Forensics

5.4.1. Providing advanced Forensics for devices that are stolen and would need investigations if any criminal activity is associated.

5.4.2. The solution should be able provide the ability to trace who has the device.

5.5. Theft Recovery

5.5.1. Capabilities to facilitate criminal acts that has occurred via theft of a device, by tracking, tracing and recovering devices.

5.5.2. Criminal activity can be linked to local Police to assist in further investigations.

5.5.3. Speedy recovery of devices to protect sensitive data and intellectual property.

6. FINANCIAL & LICENSES PROPOSAL

6.1. Finance

6.1.1. All prices must be inclusive of VAT.

6.1.2. Pricing should be charged per device for a five years period (standard table cost per device for the term of five years (60months) must be provided).

6.1.3. Annual adjustment for software/subscription licenses must be linked to Dollar/Rand exchange.

6.1.4. Application configuration support (once-off professional services) for full installation and configuration as a collective cost.

6.1.5. Annual end-user support/professional services.

6.2. Licenses

6.2.1. Baseline should be set at 4000 devices.

6.2.2. Adequate access to the Management Portal for authorised SASSA users and its contractors.

6.2.3. ***Specification Product Code is **NETSEC-NAM-MSP-GOV-60**.

7. BID EVALUATION

Bids will be evaluated in two stages based on the technical capability of the bidder as well as on price and B-BBEE status level contributor where the 80/20 principle will be applied.

The bid will be evaluated as follows:

Stage One: Phase One - Pre-Qualification,

Stage One: Phase Two – Special Condition,

Stage One: Phase Three – Administrative Compliance,

Stage One: Phase Four – Mandatory Requirements.

Stage Two: Price and B-BBBEE Status level of contribution

7.1. Stage One: Phase One – Pre-Qualification

7.1.1. Only bidders who qualifies as Exempted Micro Enterprise (EME) or Qualifying Small Enterprise (QSE) are eligible to apply.

7.1.2. Bidders who qualify as Exempted Micro Enterprise (EME) are required to submit sworn affidavit signed by the EME representative and attested by the Commissioner of Oath or BBB-EE certificate confirming their annual turnover of less than ten (10) million.

7.1.3. Bidders who qualify as Qualifying Small Enterprise (QSE) are required to submit sworn affidavit signed by the QSE representative and attested by the Commissioner of Oath or BBB-EE certificate confirming their annual turnover of between ten (10) and fifty (50) million.

7.1.4. Joint Venture companies or Consortium to submit a consolidated BBB-EE certificate.

NB: Failure to comply with the above will result in your bid being disqualified.

7.2. Stage One: Phase Two – Special Conditions

7.2.1. The bidder must submit a single point of contact (project manager) must have the following qualifications and experience:

7.2.1.1.   Projects in Controlled Environments (PRINCE) 2 or Project Management Body of Knowledge (PMBOK).

7.2.1.2.   Four (4) or more years work experience in project management.

7.2.2. The bidder must provide an OEM letter indicating the ability for the bidder to provide, deploy, maintain and support the proposed service. The letter should have valid contact details of the OEM.

7.2.3. The bidder must have at least completed one project of similar nature. Provide contactable reference letter in the client's letter head.

7.2.4. The bidder must provide a confirmation letter from OEM being a value added partner. The letter should have valid contact details of the OEM.

NB: Failure to comply with the above special conditions will result in your bid being disqualified.

7.3. Stage One: Phase Three – Administrative compliance

7.3.1. Bidders are required to submit the following:

7.3.1.1. Proof of registration with National Treasury Central Supplier Database;

7.3.1.2. Fully completed and signed Standard Bid Document (SBD) forms; and

7.3.1.3. Tax Compliance Status Pin

NB: Failure to submit any of the above may render the bid invalid.

7.4. Stage One: Phase Four – Mandatory Requirements

7.4.1. Bidders to fully comply with all mandatory requirements marked with three asterisks (***).

7.4.2. The mandatory requirements compliance checklist will be used to evaluate the bidders' proposals. The bidders can use the checklist as a guide of what mandatory elements will be evaluated for this bidder and considered successful.

NB: Failure to comply with any of the mandatory requirements will lead to automatic disqualification of the bid.

7.5. Stage Two: Price and B-BBBEE Status level of contribution

This bid will be evaluated in terms of 80/20 preference point system.

EVALUATION CRITERIA ON PRICE AND B-BBEE STATUS LEVEL OF CONTRIBUTOR

Price and Preference	100
Price	80
BBBEE Status level of contributor	20

7.5.1. 80 points will be for price and the 20 points will be for B-BBEE level of contribution.

7.5.2. Points will be awarded to a bidder for attaining the B-BBEE status level points for B-BBEE Status level of contributor.

7.5.3. In terms of Regulation 5 (2) and 6 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the BBBEE status level of contribution in accordance with the table below.

BBBEE Status level of Contributor	Number of Points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6

BBBEE Status level of Contributor	Number of Points (80/20 system)
7	4
8	2
Non-compliant contributor	0

7.5.4. BROAD-BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE) STATUS LEVEL

VERIFICATION CERTIFICATES

7.5.4.1. Bidders are required to submit proof of B-BBEE Status level of contributors to substantiate their B-BBEE rating claims. Proof includes B-BBEE Status Level Verification Certificates.

7.5.4.2. Bidders who qualifies as EME's to submit a Sworn affidavit signed by the EME representative and attested by a Commissioner of oaths or BBBEE certificate issued by CIPC.

7.5.4.3. A trust, consortium or joint venture (including unincorporated consortium and joint ventures) must submit a consolidated B-BBEE Status Level verification Certificate.

7.5.4.4. Public entities and tertiary institutions must also submit B-BBEE Status Level Verification Certificates together with their bid.

7.5.4.5. Bidders must ensure that the B-BBEE Status Level Verification Certificates submitted are issued by the following agencies:

Bidders other than EMEs

(i) Verification agencies accredited by SANAS; or

Bidders who qualify as EMEs

(i) Sworn affidavit signed by the EME representative and attested by a Commissioner of oaths.

(ii) BBBEE Certificate issued by CIPC

7.5.4.6. Certificates issued by IRBA and Accounting Officers have been discontinued and bidder(s) who submitted such certificate(s) will be considered invalid certificate and points for B-BBEE level of contribution will not be awarded.

8. BID CONDITIONS

a) Failure to comply with mandatory requirements will lead to automatic disqualification of the bid.

b) Bidder must respond to all elements of the bid with diligence as SASSA intends to appoint one successful bidder to provide these services.

c) SASSA will contract and also conclude Service Level Agreement(s) with the successful bidder.

d) General conditions of contract as stipulated by the National Treasury of the Republic of South Africa will be applicable.

e) There will be a noncompulsory virtual briefing session.

f) Data and Intellectual Property (IP) will be owned by SASSA.

g) The successful bidder may be subjected to a compulsory and positive security screening process.

h) SASSA reserves the rights to negotiate price with the successful bidder.

DEVICE MANAGEMENT, SECURITY, DATA PROTECTION & THEFT RECOVERY SOLUTION FOR A PERIOD OF FIVE (5) YEARS
BID
ANNEXURE A
MANDATORY REQUIREMENTS COMPLIANCE CHECKLIST

#	Description	Comply? Yes	Comply? No
1. DEVICE ASSIGNMENT AND REPORTING			
4.1.1	Device Management Service to adhere to asset audit and compliance specifications.		
4.1.2	Persistent asset tracking technology to be activated on laptop/mobile devices.		
4.1.3	Computer Serial number coupled to tamper proof electronic serial number (ESN) in the BIOS.		
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4.1.5	Access Control, management of employee and guest devices movement in and out of South African Social Security Agency buildings in the Cloud Console.		
4.1.6	Audit and Procurement verification integrated service to verify asset assignment to employee and department. Verification by scanning procured devices against Purchase Order (PO) and storeroom management.		

#	Description	Comply? Yes	Comply? Yes
2. CONFIGURATION MANAGEMENT AND VARIANCE REPORTING			
4.2.1	Service Function to execute Scripts remotely to a specific group or subset of devices from a library of predefined scripts.		
4.2.2	Reporting on Software that is not approved by the Agency.		
4.2.3	The device performance such as used vs remaining space on Disk Drive and Random Access Memory (RAM) along with usage of the device.		

3. LOST AND STOLEN DEVICES

#	Description	Comply? Yes	No
4.3.1	Physical location of all devices managed and the ability to ring fence all, subset or specific devices to control movement thereof.		
4.3.2	System to identify and manage a device which is lost or stolen.		
4.3.3	Stolen device must have data remotely deleted and proof of data removal.		
4.3.4	Reporting of stolen devices and the global recovery thereof.		

4. ADDITIONAL REQUIREMENTS

#	Description	Comply? Yes	Yes
4.4.1	The single point of contact (project manager), who will be responsible for the delivery, full installation and configuration of the Asset and Device Tracking solution. The single point of contact (project manager) must have the following qualifications and experience:		
4.4.1.1	Projects in Controlled Environments (PRINCE) 2 or Project Management Body of Knowledge (PMBOK).		
4.4.1.2	Four (4) or more years work experience in project management.		
4.4.2	A contractual agreement, with clear deliverables and timeframes will be signed with the successful bidder upon award of the bid.		
4.4.4	The installation and configuration must be signed-off by the relevant OEM officials and provide assurance to the South African Social Security Agency officials upon completion thereof. The OEM should confirm that the warranty is not voided after implementation of the Asset and Device Tracking solution.		
4.4.5	The bidder must provide a confirmation letter from OEM being a value added partner. The letter should have valid contact details of the OEM.		
4.4.6	SASSA seeks a solution that will be able to host its data within the South African borders in compliance with the POPI Act.		
4.4.7	Evidence of product code specifically stating NETSEC-NAM-MSP-GOV-60		

DEVICE MANAGEMENT, SECURITY, DATA PROTECTION & THEFT RECOVERY SOLUTION FOR A PERIOD OF FIVE (5) YEARS BID

ANNEXURE B
SERVICE PRICING TEMPLATE

1. The format provided here-below for the pricing summary thereof. All prices must be in South African Currency.

2. The indicated grand total price must be the total price for the duration (**60 months**) of the bid.

Total Bid Price

Item	QTY	Total Price
Software/Subscription Licenses	4000	
Application Configuration Support (Once-off Professional Services) for installation and configuration		
Annual end-user support/professional services		
Sub-Total		
VAT		
Grand Total (Including VAT)		