



BeyondZero

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TERMS OF REFERENCE (TOR) FOR PROCUREMENT OF ICT SERVER INFRASTRUCTURE AND CLOUD SERVICES

SUMMARY	
Title	PROCUREMENT OF ICT SERVER INFRASTRUCTURE AND CLOUD SERVICES
Reference	BZ-GF-2022-12-02
Description (Summary for website - 100 words max)	Beyond Zero seeks to appoint a reputable and experienced ICT partner to provide a hosted server infrastructure and cloud services.
Submission by email only to	crs-procurement@beyondzero.org.za
Submission must include	<ol style="list-style-type: none">1. Valid BBB-EE Certificate (from SANAS Accredited Verification Agency)/Sworn Affidavit2. SARS Tax Clearance Status/pin3. In bids where consortia / joint ventures / sub-contractors are involved; each party must submit a separate proof of TCS / PIN4. Valid VAT registration certificate /Notice of Vat Registration for all expenditure more than R1 million5. Signed Global Fund Code of Conduct for Suppliers of Services6. Completed and signed Declaration of Interest7. Completed and signed bid document8. CIPC Registration Documents
Deadline for submission	22 December 2022, 13h00





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1. PURPOSE

1.1 Beyond Zero intends to appoint a reputable, well-resourced, and experienced ICT partner to provide an integrated, scalable, secure, resilient, and fully managed ICT server infrastructure solution (IaaS) hosted on a private cloud over a twenty-four (24) months agreement.

2. BACKGROUND

2.1 The current on-prem server infrastructure is made up of the following components:

- SQL/Application Server
- File Server/AD

Server	OS	HDD1	HDD2	MEMORY	CPU	SQL	Purpose
Server 1 SQL/App Server	Microsoft Windows Server 2012 R2 Standard	1 TB	-	16.0 GB	Intel(R) Xeon(R) CPU E5-2430 v2 @ 2.50GHz, 2500 Mhz, 6 Core(s), 12 Logical Processor(s)	SQL server 2012	SQL databases and SAGE HR and Payroll applications
Server 2 AD and File Server	Microsoft Windows Server 2012 R2 Standard	500	1 TB	16.0 GB	Intel(R) Xeon(R) CPU E3-1240 V2 @ 3.40GHz, 3401 Mhz, 4 Core(s), 8 Logical Processor(s)	N/A	Active Directory and file storage

3. SCOPE OF WORK

The successful service provider will be expected to:

- 3.1 Transition Beyond Zero from the current on-premises infrastructure to the new environment. The transition will include migrating data and applications from the current servers to the new servers.
- 3.2 Implement, migrate, operate, and maintain an integrated, scalable, secure, resilient, and fully managed externally hosted cloud-based ICT server infrastructure solution.
- 3.3 Take ownership of the assets and all risks associated with maintaining a fully functional ICT server infrastructure solution with high availability.





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3.4 The implementation of the proposed solution must be completed within 14 days from date of appointment and adoption of Service Level Agreement. (Please include project plan)

3.5 **Server Infrastructure Services**

- The cloud service provider will be expected to build, implement, migrate, maintain, and manage an offsite cloud-based server infrastructure (IaaS), hosted in South Africa in a certified data centre, for an initial period of two years. The solution will include Backup as a Service (BaaS) and cloud edge security with clustered UTM appliances and dedicated virtual firewalls.
- The managed service should include administration, deployment, patch management, performance monitoring, and availability management as standard, and provide Beyond Zero with a dashboard to deploy or de-commission virtual servers and blocks of (tiered) storage on demand.
- Bidders are expected include details regarding any change management processes to be followed in the administration and management of the cloud environment. Other relevant information that may be included in bid responses include operating system optimization and incident management, network settings, performance, capacity, and availability monitoring, including access to dashboards and reports, access for Beyond Zero ICT staff (i.e., manage domain users), etc.

3.6 **Network Infrastructure / Connectivity**

- Beyond Zero requires a secure, point-to-point link from our Rivonia, East London, Polokwane and Bloemfontein offices to the hosted cloud servers. The current ISP to BZ will ensure connectivity from our offices to the data centre and the bidder is required to provide a cross-connect link (VPN) from the offices to the cloud infrastructure. The prospective bidder will be expected to assist with the configuration of the links to their environment and provide IP addresses and rack details.

3.7 **Security**

- The CSP will manage access to the environment by means of a firewall in accordance with the Beyond Zero Security Policy, provide support for firewall issues and make changes (i.e., opening and closing of firewall ports) based on change control requests.
- Security monitoring, maintenance, and comprehensive reporting.
- Secure VPN connections for remote access / access from anywhere.





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- Service provider to state in detail, the security mechanisms and tools provided as part of the solution to ensure Beyond Zero meets governance, regulatory, compliance requirements and best practices, including real-time threat management and protection, and data-loss prevention.

3.8 Antivirus/Endpoint Security

- Management and support of an anti-virus management solution to identify, control and respond to malware by ensuring that all agreed network connected devices are configured with the approved anti-virus software suite to detect and disinfect all known virus threats.
- Ensure that virus signature files are maintained and updated as per antivirus vendor recommendations.
- Management, monitoring and support of agreed anti-virus application (including alerting BZ IT of virus infections).
- Provide anti-virus report with agreed content and frequency and distribute to agreed recipients.

3.9 Software Licenses

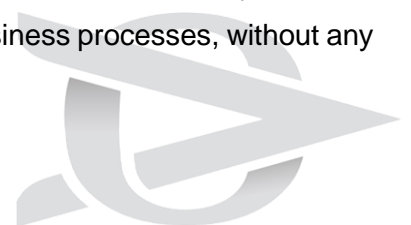
- Bidders will be required to make provision for the following software licenses using the NGO pricing model:
 - i. Microsoft SQL Server 2019 x 1
 - ii. Windows Server 2019 x 2

3.10 Data Backup and Retention

- Provide a backup solution for all servers and emails on Microsoft 365.
- Data backups will be based on a predefined backup schedule and retention policies, and the ability to recover should the need arise (including archiving).
- The schedule must comply with the Beyond Zero backup policies with daily monitoring and reporting of all backups and to ensure data integrity of files and databases.

3.11 Disaster Recovery/Business Continuity

- Design, implement, operate, and maintain a cost-effective business continuity solution (infrastructure level) to enable Beyond Zero to resume critical business processes, without any





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data loss, within the agreed recovery time objectives. This requirement can be addressed by means of a replication site and testing accessibility to the secondary data centre.

3.12 Support

- Provide skilled support as and when required, as it relates to the services offered including service requests, incidents, and problems. Beyond Zero resources will be responsible for end-user support (including first line AD support – creating, updating users).
- This should include access to a 24 hour, 7 days a week, 365 days of the year help / support desk for service request logging, classification, assignment, tracking, escalation, closure, and reporting.

3.13 Governance

- From an ICT governance and management perspective, Beyond Zero follows the Control Objectives for Information and Related Technologies (COBIT 19) good-practice framework.
- Bidders are to demonstrate how they would provide the required management, monitoring and reporting information related to the cloud environment and services to Beyond Zero to comply to COBIT requirements for good practice.
- Provide such tools to Beyond Zero (dashboards, analytics, and reports) which may include the following:
 - i. User Activity Monitoring.
 - ii. Real-time performance, capacity and availability monitoring and reporting (via set thresholds).
 - iii. Monitoring and reporting on abuses or security violations.
 - iv. Dashboard with the functionality to manage resources on the virtual machines.

3.14 Relationship/Account Manager

- Assign a dedicated account / service manager in order to give Beyond Zero access to a single point of contact in order to simplify the daily administration and management of the contract and services.
- The relationship/service manager will be responsible for, but not limited to:
 - i. Monitoring of overall performance of services,





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- ii. Coordinating the delivery of services for Beyond Zero and
- iii. The management of any third parties/partners and subcontractors providing services as part of any agreement, to ensure quick resolution of any issues.

3.15 Ownership and Sovereignty of Data

- Beyond Zero will have full ownership and access to its data. All data shall reside in a data centre within the borders of South Africa. The prospective bidder will be required to comply with the Protection of Personal Information (POPI) Act of 2013.

3.16 Service Level Agreement

- Please include a draft service level agreement (SLA). The SLA must (amongst others) clearly state the deliverables, the roles and responsibilities of all stakeholders, response times, performance guarantees and penalties for non-performance. Security and governance are of particular concern and should be addressed in detail.

4. RESPONSE REQUIREMENTS

- 4.1 The successful service provider must first design, build and configure the cloud infrastructure environment as per the current configuration and Beyond Zero will commence with payment once the services are in use. As part of proposals, please indicate/make provision for the following:
- 4.2 All-inclusive pricing including all hardware, installation, commissioning, project management, delivery, and travel. Indicate cost for alternatives where applicable.
- 4.3 Implementation schedule with timelines.
- 4.4 Skilled resources to provide technical support.
- 4.5 Possible system enhancements and value adds that can be offered at no additional cost
- 4.6 Multiple costing structures and benefits to Beyond Zero of each option.
- 4.7 Outline of any additional features or benefits that will add value to Beyond Zero.
- 4.8 Details of services that will be provided and billed for in addition to the standard offerings proposed that is based on the requirements specified.
- 4.9 Training of Beyond Zero IT staff on the bidders' tools.
- 4.10 Service providers must respond to the full scope of work. However, business requirements may





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change resulting in an increase or reduction of the scope. Flexibility must therefore be built into the proposed solution by way of quoting separately for all the different elements.

4.11 Beyond Zero reserves the right to exclude any services from the final agreement and not to award the complete solution to any one supplier.

5. EVALUATION CRITERIA

The evaluation of proposals will be managed by an Evaluation Committee which will prepare a shortlist of applicants that meet the eligibility for appointment. The evaluation process will be conducted according to the following stages:

- **Stage 1:** Assessment of administrative compliance with eligibility criteria. Applications that do not comply will not be evaluated further.
- **Stage 2:** Assessment on technical evaluation criteria competency focusing on the ability to fulfil the required scope of work. Service providers need to achieve a score of at least **85 out of 100** points to progress further.
- **Stage 3:** The final stage of evaluation will be the application of the preference points system price at 80 points and B-BBEE 20 points.

4.1. ELIGIBILITY EVALUATION STAGE 1

Table 1: Eligibility evaluation criteria

CRITERIA	SUB-CRITERIA	Comply/Not Comply
ELIGIBILITY	Valid BBB-EE Certificate (from SANAS Accredited Verification Agency)/Sworn Affidavit	Pass/Fail
	SARS Tax Clearance Status/pin	
	In bids where consortia / joint ventures / sub-contractors are involved; each party must submit a separate proof of TCS / PIN	
	Valid VAT registration certificate /Notice of Vat Registration for all expenditure more than R1 million	





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CRITERIA	SUB-CRITERIA	Comply/Not Comply
	Signed Global Fund Code of Conduct for Suppliers of Services	
	Completed and signed Declaration of Interest	
	Completed and signed bid document	
	CIPC Registration Documents	

4.2. STAGE 2: TECHNICAL EVALUATION CRITERIA

Only service providers who score 85 points or more in stage 2 will be evaluated further in stage 3 for price and B-BBEE evaluation.

Table 2: Technical evaluation criteria

Criteria	Description of Sub-criteria	Weighting
Technical Approach	<p>Detailed Project Plan with deliverables, timelines, and milestones</p> <p>Approach and/or methodology and/or plan to be employed. The project plan must include ALL the requirements in detail as outlined in the scope of work. This must also include comprehensive project life-cycle activities.</p> <p>Scoring Matrix</p> <p>Server Infrastructure = 20 Points</p> <p>Backups, security, replication, connectivity = 20 Points</p> <p>Non-submission of Methodology and/or Project Approach/Plan = 0 points</p>	40





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Criteria	Description of Sub-criteria	Weighting
	<p>Project Manager - Certification and Experience in Server Infrastructure and Cloud Services</p> <p>The CV and certified copies of qualifications, of the Project Manager for Server Infrastructure and Cloud Service should be submitted.</p> <p>Project Management Certifications (certified i.e., not more than three (3) months from submission date)</p> <p>Scoring Matrix</p> <p>PMP or Similar = 20 points</p> <p>Non submission of above certification and/or documents not certified = 0 Point</p>	20
	<p>Account/Relationship Manager - Certification and Experience in Server Infrastructure and Cloud Services.</p> <p>The CV and certified copies of qualifications, of the Account/Relationship Manager for Server Infrastructure and Cloud Services should be submitted.</p> <p>Account/Relationship Manager Certifications (certified i.e., not more than three (3) months from submission date)</p> <p>Scoring Matrix</p> <p>An IT/Electrical Engineering Degree = 10 points</p> <p>5 years' and more experience in IT service management/IT Management/Account Management or a similar role. = 10 points</p> <p>No submission of above certification and/or documents not certified = 0 Point</p>	20





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Criteria	Description of Sub-criteria	Weighting
References of the service provider / Company Experience	<p>The bidder should provide and attach formal reference letters and appointment letters from their clients it has provided/is providing services of similar scope of work.</p> <p>Reference must not be older than five (5) years, and the written reference must be submitted on the letterhead of the previously serviced clients and should at least reflect name of the clients, title of the related work conducted, contactable reference name and contact number and signed by the appropriate delegate.</p> <p>Scoring Matrix</p> <p>Five (5) and more appointment and reference letters = 20 Points</p> <p>Three to Four (3 - 4) appointment and reference letters = 10 Points</p> <p>One to Two (1 - 2) appointment and reference letter = 5 points</p> <p>Non-submission of appointment and reference letter = 0 points</p>	20
		100
	Minimum Threshold	85

4.3. PRICE AND B-BBEE EVALUATION STAGE 2

Service Providers that have successfully score a minimum of 85 points on stage 2 will be evaluation on stage 3 (Price and B-BBEE). It is recognized that it is difficult for a prospective service provider to be firm about the extent of the work based solely on the terms of reference. However, to assist with assessments, a service provider will be provided with scenarios in the pricing schedule for evaluation purposes whilst a rate card will be provided and must be completed to be used during delivery of the services.

NB: Service Providers should note that the scenarios provided below are for the purposes of





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evaluation of the tender and a rate card unit price will be used during execution of the services. The service providers' tender response will be evaluated based on a combination of price and BBBEE in accordance with the ratios set out below:

Price and B-BBEE	Weighting
Price	80
B-BBBEE	20
Total	100

Price evaluations will be conducted using the following formula:

$$\text{Lowest bid price} = 80$$

$$\text{Price under calculation} = 80 \left(1 - \frac{\text{Price under consideration} - \text{Lowest bid price}}{\text{Lowest bid price}} \right)$$

BBBEE evaluations will be conducted in accordance with the following table:

B-BBEE Status	Number of Points (80/20 system)
Level 1	20
Level 2	18
Level 3	12
Level 4	10
Level 5	8
Level 6	6
Level 7	4
Level 8	1
Non-compliant	0





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1. PRICING SCHEDULE

#	Description	Unit of Measurement	Quantities	Unit Price	Total
1.	SQL/Application Server	Monthly	24	R	R
2.	File Server/AD	Monthly	24	R	R
3.	Connectivity and Security	Monthly	24	R	R
4.	Managed Services	Monthly	24	R	R
5.	Cloud Backup	Monthly	24	R	R
6.	Replication	Monthly	24	R	R
7.	Training	Once-off	1	R	R
TOTAL					R
15% VAT					R
GRAND TOTAL					R

Pricing Schedule Note:

- i. Price should be VAT Inclusive.
- ii. Rand amount should be rounded off to two (2) decimal points.
- iii. Service providers are required to price on all items.

NB. Error/s made must be scratched and signed next to the error by the same person who signs the bid document. Therefore, no tipex allowed. In addition, error/s made and relating to price must be accompanied by a letter [in the service provider's letterhead] pointing out the error made and acknowledging that it is the delegated signatory and was signed by the service provider for reasons of correcting the error. In the event that the service provider fails to complete fully this form of price schedule or to provide the information requested, or to sign the bid at the appropriate spaces provided or next to errors, the bid will be rejected as nonresponsive.

