



**OFFICE OF THE IT DIRECTOR and CIO**  
**OpenText SERVICE MANAGEMENT**  
**AUTOMATION X (SMAX) MAINTENANCE &**  
**SUPPORT TENDER**

TENDER NO:

RFI-202501-00327

**Tender Description**

**INVITATION TO TENDER**

Suitably qualified service providers interested in providing OEM license maintenance and support services to the University of Pretoria, as specified in the tender document and subject to the terms and conditions as set out herein, are invited to tender.

<b>Date of Issue</b>	29 January 2025	
Compulsory Online Information Session	<b>Date</b>	12 February 2025
	<b>Time</b>	14h00
	<b>Link</b>	<a href="https://meet.google.com/mgt-fqzv-eja">meet.google.com/mgt-fqzv-eja</a>
Last date for submission of questions/clarifications	14 February 2025	
Closing Date	19 February 2025 at 14h00	
Electronic Submission Link	<a href="http://www.up.ac.za/tender">www.up.ac.za/tender</a> The tender portal is an electronic system that encrypts all responses and no staff of the University has access to any of the documentation until after the tender has closed. Please familiarise yourself with the system and upload all info at your earliest convenience to avoid possible last-minute challenges.	

***Bidder to complete this section***

<b>Company Name</b>		
<b>Address</b>		
<b>Contact Person</b>	<b>Ms/Mrs/Mr/Prof/Dr</b>	
<b>Contact Numbers</b>	<b>(w)</b>	<b>(cell)</b>
<b>Email Address</b>		

**Late, incomplete or incorrectly submitted tenders will not be accepted.**

## **1. INTRODUCTION**

As one of South Africa's oldest and most prestigious institutions of higher education, the University of Pretoria provides a refreshing mix of academic tradition and progressive vision. The latter is brought to life by means of world-class research that results in positive, tangible contributions to both local and global communities. It also provides an environment that is stimulating, intellectually challenging and conducive to optimising teaching and learning. The approach to education is holistic. The University of Pretoria was founded in 1908. Currently the University has in excess of 53 000 students each year and a staff compliment of 5500. The University has over 285 000 Alumni globally. The vision at the University of Pretoria is to be a leading research-intensive university in Africa, recognised internationally for its quality, relevance and impact, as also for developing people, creating knowledge and making a difference locally and globally.

The University of Pretoria, is presently evaluating potential suppliers to identify a proficient provider capable for the administration and maintenance services required for the OpenText Service Management Automation X (SMAX) system being used at the University.

This document and annexures contain relevant information in respect of the operational and physical specifications for the services to be performed at the specified campuses of the University of Pretoria. Bidders should study the information provided in detail before responding to the tender. If the bidder cannot meet the requirements, it will be excluded from any further consideration. The conditions set out in this specification will be used as a basis for monitoring the operations.

All costs incurred in replying to this 'request for tender' (RFT) shall be for the account of the bidder.

### **1.1. Current Environment Description**

The Managed System Administration service that is currently being provided by an external service provider, ensures that the systems in use at the University remain well-maintained and in good health. These systems fulfil important functions for various reasons, are feature-rich, and complex and require good management to ensure the value derived from the systems, meets the University's expectations.

Adequately trained and experienced administration staff attend to the SMAX system's day-to-day operation and administration, ensuring that University employees can access and use the system, as well as analyse the system logs to identify warnings or errors, which could result in a system outage. Detailed knowledge of the architectural, technical and implementation specifications of our system require specialist skills to administer the system to best practice standards.

SMAX is hosted on-premise on a cluster configuration of medium size (according to the OpenText hardware requirement matrix), with a 3 to 7, master to worker node configuration. The current licenses are listed within the attached MS Excel assessment sheet.

## **2. COMPULSORY INFORMATION SESSION**

Prospective bidders must attend a compulsory one (1) hour online information session on 12 February 2025 at 14h00.

To join the information session on Google Meet, use the following link: [meet.google.com/mgt-fqzv-eja](https://meet.google.com/mgt-fqzv-eja)

### 3. VALIDITY OF TENDER

Tender documentation submitted by the bidder shall be valid and open for acceptance for a period of 90 (Ninety) calendar days from the closing date and time stipulated in the tender advertisement.

Should the bidder withdraw this proposal within the period for which prices shall remain open for acceptance, or fail to fulfil the contract when called upon to do so, the University may, in addition to any other remedies it may have, withdraw the tender or cancel the contract.

### 4. SCOPE OF WORK (SPECIFICATION)

The bidder should possess the requisite resources and industry-specific expertise to render the services in accordance with the requirements of the University as set out in these tender documents. The bidder must provide all required equipment, materials, and any other items necessary to perform the services. The services are to be provided cost-effectively and efficiently while being integrated with the daily activities occurring on and around all the University's campuses.

Note that any claims made in your response must be substantiated, where possible. The bidder is required to provide all required equipment, materials, and any other items necessary to perform the services. -

Bidders should respond to this RFT using the sheets provided in the document: "**Annexure A - SMAX RFT Questionnaire**".

#### 4.1. Vendor Requirements

1. The bidder must have a minimum of four (4) years of experience in providing administration services for Service Management Automation X (SMAX).
2. The bidder must have a presence in South Africa and the bidder's South African head office or support site must be in the Gauteng area.
3. The bidder must have a proven history of independently implementing, supporting and maintaining SMAX within South Africa. The bidder must provide four (4) reference sites of similar installations to UP, including detailed descriptions of the services delivered and contact details for verification.
4. The bidder must indicate their accreditation rating status with OpenText and provide a copy of all their OpenText certifications relating to ITOM. This will be verified with OpenText.
5. The bidder must specify the number of in-house resources employed that have experience in providing administration services for Service Management Automation X (SMAX).
6. Provide CVs of the resources designated to provide services to the University, such as support engineers, site managers and project managers. The CVs should contain personal identifiable information, concise relevant experience and relevant certifications.
7. The bidder must showcase active participation in the OpenText market place within the relevant practice and relevant solutions. The claimed participation will be verified on the market place.

## 4.2. Support Requirements

The University intends to engage in a five-year agreement with the successful bidder for maintenance and support for the SMAX environment. The University requires the following:

1. The bidder must provide a comprehensive plan on how support will be carried out. The plan should include:
  - 1.1. Organogram of staff allocated and their roles.
  - 1.2. How the quality of work done will be managed.
  - 1.3. How performance will be managed to ensure that faults are resolved within agreed service level timelines.
  - 1.4. General communication and alerts process.
  - 1.5. Change management procedures.
  - 1.6. How daily system administration for end user and management enquiries will be handled.
  - 1.7. How business process conformance will be ensured.
  - 1.8. How master data will be managed and maintained.
  - 1.9. How service portal administration will be managed and maintained.
  - 1.10. How scheduled system maintenance will be performed. Provide a list of scheduled maintenance activities.
  - 1.11. How integration verification and validation will be ensured as well as exception reports will be handled.
  - 1.12. Provide detail regarding continual service improvement management processes and plans (non-technical but strategic).
  - 1.13. How system log analysis and reporting will be managed.
  - 1.14. Explain how the support process will work.
2. The University requires a Service Level Agreement (SLA) that includes support and maintenance for the system as well as for all the active tenants. Include an example of your SLA which contains at least the following components:
  - 2.1. Service Levels: The University requires a priority-based SLA with at least a minimum of 3 severities, Severity 1, Severity 2 and Severity 3. Severity 1 being the most severe and Severity 3 being the least severe. Provide an example of your suggested service levels and severity matrix, including resolution times for each.
  - 2.2. Service Review Meetings: Monthly in person service review meetings must be held to discuss issues, outstanding requests, projects, and other relevant matters. Explain how these service review meetings will be conducted.
  - 2.3. Service Level Reporting: The University requires monthly service level reports that include system governance and performance reporting as well as health and availability checks for the environment. Provide an example of such a report.
  - 2.4. Escalation Process: The University requires a clear and concise escalation process, including contact details. Provide the necessary details.
  - 2.5. Helpdesk Service: The University requires the service provider to make use of a ticketing system or make use of UP's SMAX as a service management solution. Explain how this will be established.

- 2.6. Service Hours: The services specified in the agreement must be available during normal office hours (weekdays between 7h00 and 17h00). Permanent on-site support is not required. The service provider will be required to provide standby support after hours when necessary. Explain how this will be managed.
3. Patch Installations and Version Upgrades: The University requires patch installations and version upgrades to be completed within the following timeframes and in accordance with the UP change control guidelines:
- System Upgrades: Upon the release of the next version (N = minus1)
  - System Patch Management (minor patches): within 1 month of a patch release (dependent on urgency and criticality adhering to the change management process or possible change freeze periods.)
- All software must be proactively tested in a lab environment provided by the vendor, before being deployed to the UP production environment.
- The University requires software installations to be scheduled in line with its change control guidelines.
- Explain how this will be managed.
4. Maintenance renewal of licences: The University requires management of the renewal process for all licences. The University expects all renewals to be processed and confirmed within 60 days prior to the expiry dates. The licensing model required is perpetual, i.e. compulsory annual license payments (which include maintenance and support), without which the solution will not function. Explain how this process will be managed.
5. Training: The vendor must be able to provide training upon request, with costs to be billed and negotiated separately from the standard contract. Please specify how training is managed and delivered to clients. If training is facilitated with the OEM, indicate as such.

### **4.3. Maintenance and Support Quotation Requirements**

Provide the prices and quotes using the sheets provided in the document "**Annexure A - SMAX RFT Questionnaire**".

Quotes must be provided in ZAR and must include VAT. Prices must remain valid for 90 days and be broken down into the following categories:

#### **4.3.1. Support Pricing**

- Provide costs for support services covering years 1 to 5.
- Provide the relevant hourly rates for each type of resource as indicated on the sheet.
- Specify the travel rate per kilometre and the number of kilometres per callout.

#### **4.3.2. Licencing Maintenance Pricing**

- Provide licencing costs for each item covering years 1 to 5.
- Indicate the exchange rate used (US\$ to ZAR), if applicable.
- Indicate whether the quotes include a forward cover.
- **Annexure B** is an authorisation letter that will allow a bidder to view UP's SMAX licences.

## 5. ENQUIRIES

Should any bidder have any questions/clarifications relating to this invitation to tender, such inquiries may be addressed to the attention of Mr Vian Krüger ([vian.kruger@up.ac.za](mailto:vian.kruger@up.ac.za)). Any queries must be submitted in writing prior to the closing date for questions/clarifications.

For queries related to online registration on the University of Pretoria's Tender website and/or submission of electronic tender and supporting documentation, please contact Mr Vian Krüger prior to the closing date of the tender.

## 6. CONSORTIUMS AND JOINT VENTURES

No joint ventures or partnership responses will be considered for this tender. Such responses will result in immediate disqualification from the evaluation process.

## 7. MANDATORY DOCUMENTS TO BE SUPPLIED WITH TENDER

Mandatory documents	Tick if submitted	
	Yes	No
Signed RFT document with each page initialled and STATEMENT OF COMMITMENT completed by a delegated representative.	Yes	No
Brief company profile (basic details relevant to this RFT).	Yes	No
Registration document of the enterprise (CK1/CK2 or CM29/CM22).	Yes	No
Valid SARS Tax Clearance Certificate and SARS PIN. Note that a bidder must be 'Tax Compliant' on the SARS website on the day that the RFT closes. If a bidder has a 'Tax Non-compliant' status, the bidder will be disqualified.	Yes	No
VAT registration certificate.	Yes	No
Audited financial statements or financial statements signed by the relevant accounting officer (comprising the preceding two (2) years' financial statements, i.e. a minimum of two (2) years' comparative figures and signed by the Accounting Officer).	Yes	No
Valid B-BBEE certificate from SANAS/IRBA accredited verification agency.	Yes	No
Proxy: Attach a director's resolution or proxy, authorising the signatory of the RFT documents, to sign the document on behalf of the bidder (if applicable).	Yes	No
Proof of Bank Account. Submit a letter from a bank not older than 3 months.	Yes	No
Relevant OpenText certificates.	Yes	No

**Failure to comply with any or all of these pre-qualification requirements may lead to a bidder being disqualified.**

## 8. TENDER EVALUATION PROCESS

Bidders should note that the University operates a preferential procurement system:

- The University follows the prescribed scorecard applicable to universities as set out in Act 53/2003;

- The University of Pretoria Tender Policy (SCC49\_20) read together with the Procurement Procedures (SCC50\_20) apply when tenders are adjudicated; and
- The precise basis for evaluation can be made available to bidders on request.

After the closure of the RFT, the University will conduct an evaluation process as described below. Each bidder will be evaluated against a wide range of competencies. The responses to the different questions will enable the University to objectively assess the Vendor's ability to meet these criteria.

The University may arrange meetings, presentations and/or site visits, if deemed necessary. The University reserves the right to make the selection solely on the information received, or to negotiate further with none, one or more bidders.

The service provider will be selected on the basis of greatest perceived benefit to the University, and not necessarily on the response to any particular factor.

Once the RFT evaluation process has been completed, all bidders will be notified and further negotiations with the successful bidder will commence.

### **8.1. Pre-qualification assessment**

All submissions are reviewed. Only submissions that has provided all mandatory documentation and requirements will be considered in Stage 1 of the evaluation process.

### **8.2. Stage 1 – Functional analysis**

Submissions that passed the pre-qualification stage will be evaluated and rated against each criterion set out by the University.

Bidders who score a minimum of 75 points in this stage will be considered for Stage 2.

### **8.3. Stage 2 – Price and Preference analysis**

Only the submissions that passed stage 1 will be considered in stage 2. The focus in this stage of the analysis is on price and B-BBEE.

## **9. EVALUATION CRITERIA**

Bidders are required to provide detailed responses for each requirement. Provide a detailed explanation of how your solution meets the requirement. Attach any supporting documentation, diagrams, or data that reinforce your claims. Each requirement will be scored using the following scale:

- Requirement not addressed or completely unfulfilled;
- Requirement partially addressed; significant gaps; and
- Requirement fully addressed; complete and effective.

### 9.1. Stage 1: Vendor and Maintenance and Support requirements assessment

Stage 1		
Criteria	Key Components	Points
Vendor	Bidders will be assessed on all aspects listed in the vendor requirements section above.	50
Maintenance & Support	Preference will be given to bidders who can demonstrate their capability to perform the support and maintenance requirements as specified.	50
<b>TOTAL</b>		<b>100</b>

*Bidders who score a minimum of 75 points in this stage will be considered for Stage 2.*

### 9.2. Stage 2: Price and Preference Analysis

All quotations provided by bidders will be compared. Ensure that costing is comprehensive as no upward adjustments to quotations and tariffs will be accepted after the awarding of this tender.	90
B-BBEE status	10
<b>TOTAL</b>	<b>100</b>

## 10. TENDER AWARD

The final award of the tender, if any should be awarded, will be subject to the University's policies, internal processes and the rights reserved by the University.

It is recorded that the University is under no obligation to accept any of the quotations or proposals submitted during this process. The University reserves the right to accept or reject any tender fully or partially without assigning any reason. In addition, the University also reserves the right, subsequent to the submission of the tender response, to request further clarification on any representation made within the response.

The University reserves the right to negotiate further terms and conditions with the successful bidder before the final awarding of the contract.

The University does not bind itself to accept either the lowest or any other tender and reserves the right to accept the tender which it deems to be in the best interest of the University.



**11. STATEMENT OF COMMITMENT**

I, the undersigned .....  
(name of authorised official),  
in my capacity as ..... of  
.....  
(name of Bidder)

- 11.1 declare that the Bidder has studied the contents of the invitation to submit a tender and that the Bidder is prepared to execute the digital printing services according to the relevant specifications and to the satisfaction of the University;
- 11.2 have the authorisation to sign tender documents on behalf of the Bidder (*kindly attached a director’s resolution or proxy, authorising the signatory hereto to sign the tender documents on behalf of the Bidder*);
- 11.3 declare that the Bidder has the financial ability and requisite expertise to meet its obligations in respect of the services requested by the University and that it is in a sound position to meet its overall financial commitments;
- 11.4 wish to state that the information submitted is true and correct in all respects;
- 11.5 certify that, to the best of the Bidder’s knowledge –

***no official, employee, agent or representative of the Bidder has any direct or indirect vested interest in the University / wish to declare that the following officials/members of our organisation/entity have a direct/indirect interest in or with the University\*.***

*If any officials or members of the organisation/entity have any direct/indirect interest in or with the University, please provide the name of the relevant official or member along with a description of the nature of such direct/indirect interest.*

.....  
.....

.....  
**Signature of authorised official  
on behalf of the Bidder**

.....  
**Date**