



## PROVISION OF PENSION MANAGEMENT SYSTEM

Ref: PSPF/REOI/02/2024

**ISSUE DATE: 22 JUNE 2024**

**DEADLINE: 29 JULY 2024**

**TENDER OPENING: 29 JULY 2024, 1205HRS**

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REQUEST FOR EXPRESSION INTEREST (REOI):  
REOI/02/2024  
PROVISION OF PENSION MANAGEMENT SYSTEM

**Public Service Pension Fund (the Fund/Client)**, invites expressions of interest (EOI) from reputable software vendors who wish to be shortlisted for the provision of a comprehensive pension administration system.

Applicants who wish to be prequalified for this procurement should read and respond to this REOI as specified in the document.

The full document is available (downloadable) on the Eswatini Public Procurement Regulatory Agency (ESPPRA) website [www.esppra.co.sz](http://www.esppra.co.sz) and PSPF website [www.pspf.co.sz](http://www.pspf.co.sz) under the "Work With US" page on "Tenders". Interested bidders should immediately send their emails (Ref: **REOI/02/2024**) for the attention of the secretary of the tender committee to [tenders@pspf.co.sz](mailto:tenders@pspf.co.sz) so that they are included in any correspondence pertaining to any addenda or clarifications for the tender that may be issued.

Request for clarification should be sent to [tenders@pspf.co.sz](mailto:tenders@pspf.co.sz) up to 24 July 2024.

Tenders should be submitted electronically or by hand after payment of a tender fee of SZL1000.00 to PSPF Bank Account.

**The deadline for submission shall be** Monday, 29 July 2024 at 1200hrs, which shall be followed by a public opening of the application at PSPF headquarters, 1<sup>st</sup> Floor Ingcamu Building Mbabane.

Late tenders and those sent by fax shall not be accepted.

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## SECTION I

### INSTRUCTIONS TO APPLICANTS (ITA)

#### 1. Introduction

- a) Applicants shall adhere to all the requirements of this REOI, including any amendments that may be issued in writing by PSPF. This REOI is conducted in accordance with the Public Procurement Regulations, 2020
- b) For better understanding Applicants should read the 'Section II: Terms of reference' then follow the guidance of the forms in Section III to respond to the REOI.

#### 2. Prohibited Practices by the Fund

Firms who engage in any of the prohibited practices shall have their applications rejected and they shall further be reported to ESPPRA for suspension, their names shall be forwarded to the Anti-Corruption Commission for criminal investigations. For the purpose of these provisions, and consistent with the Procurement Act, 2011 the terms set forth below are defined as follows, and sometimes referred to collectively as "prohibited practices":

- a. "Fraudulent practice" is any act or omission, including a misrepresentation, that knowingly or recklessly misleads, or attempts to mislead, a party in order to obtain a financial or other benefit or to avoid an obligation;
- b. "Collusive practice" is an arrangement between two or more parties designed to achieve an improper purpose, including improperly influencing the actions of another party;

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- c. "Coercive practice" is impairing or harming, or threatening to impair or harm, directly or indirectly, any party or the property of any party, to improperly influence the actions of that or another party;
- d. "obstructive practice" is (i) deliberately destroying, falsifying, altering or concealing evidence that may be material to an investigation by the Fund or making false statements to investigators in order to materially impede an investigation by the Fund; (ii) threatening, harassing or intimidating any party in order to prevent that party from disclosing its knowledge of matters relevant to an investigation by the Fund or from pursuing such an investigation; and/or (iii) the commission of any act intended to materially impede the exercise of the Fund's contractual rights of audit, inspection and access to information.
- e. "Participation of Politicians and Public Officers" the participating of these parties in public procurement is prohibited in Eswatini.

### 3. Payment of an application fee:

An application shall be submitted after the payment of a non-refundable fee of SZL 1000.00, payable at the Fund's Bank Account at FNB using the below details:

Account name:	Public Service Pension Fund
Account Number	62007684625
Account Type	Business Cheque Account
Branch Name	Mbabane
Branch code	280164
Swift Code	FIRNSZMX

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#### 4. Eligible Applicants

- a. An applicant may be a natural person, private entity, government-owned entity or any combination of such entities in the form of a joint venture, consortium, or association (JVCA).
- b. In the case of a JVCA: the JVCA shall nominate a Representative who, through the Power of Attorney, shall have the authority to conduct all businesses for and on behalf of any and all the partners of the JVCA during the Prequalification process.
- c. All applicant shall meet the requirements of Section 40 of the Public Procurement Act in order to be deemed eligible.
- d. An applicant from any country may apply for Prequalification. An applicant shall be deemed to have the nationality of a country if the applicant is a citizen of, or is constituted, incorporated or registered in and operates in conformity with the provisions of the laws of that country.
- e. Any eligibility is subject to **ESPPRA Circular 1/2019** which expressly precludes the participation of **Politicians**, and any officer employed in the **Public Service** including procuring entities, requesting entities, the Agency and Tender Boards.

#### 5. Conflict of Interest

An applicant shall not have a conflict of interest. All applicants found to have a conflict of interest shall be disqualified. An applicant may be considered to have a conflict of interest with one or more parties in this Prequalification process, if:

- a) Has a relationship with PSPF that provides them with undue or undisclosed information about or influence over the selection process and the execution of the contract;
- b) participates in more than one application under this procurement action;

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- c) Notwithstanding the provisions of b) above, a firm may apply for prequalification both individually and as part of a JVCA. However, a prequalified firm or a member of a prequalified JVCA may participate as a tenderer in only one tender, either individually or as a partner in a JVCA, for the Contract. Submission or participation by a tenderer in more than one tender for the Contract will result in the disqualification of all tenders for that Contract in which the party is involved. However, this does not limit the inclusion of the same subcontractors in more than one application.
- d) has a business or family relationship with a member of the client's board of directors or its personnel, the Fund or its personnel, or any other individual that was, has been or might reasonably be directly or indirectly involved in any part of (i) the preparation of the expression of interest, (ii) the selection process for this procurement, or (iii) execution of the contract.

## 6. Clarification of Prequalification Document

- a. A prospective applicant requiring any clarification of the Prequalification Document shall contact the Fund in writing to the following address [tenders@pspf.co.sz](mailto:tenders@pspf.co.sz). The Fund will respond to any request for clarification, provided that such request is received three working days before the deadline for submission of applications.
- b. The Fund's response shall be in writing with copies to all applicants who have indicated their interest in the specified manner. Should the Client deem it necessary to amend the Prequalification Document as a result of a request for clarification, it shall do so following the procedure described in "Amendment of Prequalification Document" this document.

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## 7. **Amendment of Prequalification Document**

- a) At any time prior to the deadline for submission of applications, the Client may amend the Prequalification Document by issuing addenda.
- b) Any addendum issued shall be part of the Prequalification Document and shall be communicated in writing to all applicants, who have indicated their interest in this procurement, an amended copy of the REOI shall be sent to the ESPPRA website for publication.
- c) To give prospective applicants reasonable time in which to take an addendum into account in preparing their applications, the Client may, at its discretion, extend the deadline for the submission of applications.

## 8. **Cost of Prequalification**

- a) The applicant shall bear all costs associated with the preparation and submission of its application, and the Fund shall not be responsible or liable for those costs, regardless of the conduct or outcome of the Prequalification process.

## 9. **Language of Prequalification**

- a) The applications, as well as all correspondence and documents relating to the Prequalification exchanged by the applicant and the Client, shall be written in English.

## 10. **Documents Comprising the Application**

The application shall comprise the following:

- (a) Letter of Application;
- (b) All documents evidencing compliance with eligibility criteria as required by Section 40 of the Procurement Act, 2011. Applicants must refer to the Preliminary Examination table as stated in the evaluation criteria.
- (c) completed forms, furnished in Section III, Prequalification Forms;

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- (d) written confirmation authorising the signatory (Power of Attorney) of the application;
- (e) documentary evidence establishing the applicant's qualifications in support of the relevant forms furnished in Section III, Prequalification Forms;
- (f) in the case of an application submitted by a JVCA, the JVCA agreement or a letter of intent signed by all partners to the JVCA; and
- (g) any other document required by the Prequalification document.

#### 11. **Validity of Application**

The application shall remain valid and open for acceptance for **90 days** from the date of submission deadline. Any application with a shorter validity may be rejected by the bidder.

#### 12. **Submission of Application**

Only submissions reaching the Fund before the deadline shall be accepted. Applicants may submit by hand or electronically.

##### **a) Electronic submission:**

PDF format of the whole application should be emailed in a password-locked folder to the Secretary of the Tender Committee to [tenders@pspf.co.sz](mailto:tenders@pspf.co.sz) with the subject title:

**PSPF/EOI/02/2024** – Expression of Interest: Provision of a Pension Management System

*Applicants are requested to properly organize and mark clearly the different parts of their submission to make evaluation easier*

##### **b) Hand Delivery**

- i) Sealed and properly labelled envelopes should be delivered at the **Ground Floor Reception, PSPF HQ, Ingcamu Building Mbabane.**

- ii) Applicants should submit **one original and two copies** of the tender. Should there be a discrepancy between the copy and the original, the original shall take precedence.
- iii) The application should be sealed and marked accordingly:

**PSPF/EOI/02/2024**

**EXPRESSION OF INTEREST**

**Provision of a Pension Management System**

**Do Not Open Before 1205Hrs, 29 July 2024**

13. **Withdrawal, Substitution, and Modification of Applications**

- a. The bidder may withdraw its application after submission, provided that written notice is received by the Fund prior to the deadline prescribed for submission of bids.
- b. The withdrawal notice shall hand delivered or email to the address it was delivered. It should be in Applicants Letterheads and signed by a person with authority, addressed to Secretary to the Tender Board be clearly marked "WITHDRAWAL".
- c. No bid may be withdrawn in the interval between the deadline for submission of bids and the expiration of the period of bid validity specified by the bidder on the bid form. Withdrawal of a bid during this interval may result in the bidder's forfeiture of its bid security

14. **Deadline for Submission of Applications**

- a) The deadline for submission is **1200HRS, Monday, 29 July 2024**
- b) No applications submitted after the deadline shall be accepted. A late submission shall be marked late if hand-delivered and returned to the sender. An electronic submission which is late shall not be eligible to be opened.



## 15. Public Opening of Applications

- a) The Fund shall conduct the Application Opening in public, in the presence of applicants' designated representatives and anyone who chooses to attend.
- b) Only The Client shall open all other envelopes one at a time and read out: the name of the applicant, its nationality and any other eligibility documents as the Client may consider appropriate. No applications shall be rejected at the Application Opening.
- c) Opening shall be held at the 1<sup>st</sup> Floor Boardroom, PSPF HQ, Mbabane.
- d) Virtually through Microsoft Teams through the following credentials:  
**Meeting ID: 321 035 848 585**  
**Passcode: qafhY**
- e) Only applications that are opened and read out at Application Opening shall normally be considered for further evaluation.

## 16. Confidentiality

- a) Information relating to the evaluation of applications shall not be disclosed to applicants or any other persons not officially concerned with such process until information on the outcome of Prequalification is communicated to the applicants.
- b) Any attempt by an applicant to influence improperly the Client in the evaluation of the applications decisions may result in the rejection of its application.
- c) Notwithstanding the above, from the time of Application Opening to the time, when information on the outcome of Prequalification is communicated to the applicants, if an applicant wishes to contact the Fund on any matter related to the prequalification process, it should do so in writing.

## 17. Clarification of Applications

- a) To assist in the examination and evaluation of the applications, the Client may, at its own discretion, ask any applicant for a clarification of its application, allowing a

reasonable time for response. Any clarification submitted by an applicant that is not in response to a request by the Client may not be considered. The Client's request for clarification and the response shall be in writing.

- b) If an applicant does not provide clarifications of its application or substantiations of the information supplied, by the date and time set in the Client's request for clarification, its application may be rejected.

## 18. Evaluation of Applications

- a) The Client shall use the criteria and methodologies specified in the Evaluation Criteria. No other evaluation criteria or methodologies shall be permitted.
- b) The Client's evaluation of an applicant's qualification shall be based on the contents of the application itself, and clarifications thereof.
- c) The Client reserves the right to waive:
  - i) any omissions in applications that do not preclude his evaluation of an applicant's qualification;
  - ii) any minor deviations from the criteria, if they do not materially affect the capability of an applicant to perform the Contract.

## 19. Client's Right to Accept Any Application, and to Reject Any or All Applications

- a) The Client reserves the right to accept or reject any application, and to cancel the Prequalification process and reject all applications at any time prior to the time, when information on the outcome of Prequalification is communicated to the applicants, without thereby incurring any liability to the applicants. In the case of cancellation of the Prequalification process, all applications submitted shall be promptly returned to the applicants.

## 20. Notification of Outcome of Prequalification

- a) The Fund shall notify all applicants about the outcome of Prequalification in writing. This notification shall further be published in ESPPRA website.
- b) The notification shall be made after verification of all information or claims made by the applicant in its submission. Any negative determination shall result in the rejection of a firm's application.
- c) The notification shall include, as a minimum: the names of the prequalified applicants and their nationality.
- d) The applicants should be advised that only firms and JVCA that have been prequalified under this Prequalification will be eligible to tender.
- e) After publication of the outcome of Prequalification, unsuccessful applicants may request in writing to the Client for a debriefing seeking explanations on the grounds upon which their application was rejected. The Client shall promptly respond in writing to and arrange a debriefing of any unsuccessful applicant who, after publication of the outcome of Prequalification, requests a debriefing.

## 21. Invitation to Tender

- a) The Client shall invite to tender for the Contract only those applicants who have been prequalified under this procedure.
- b) At the time of submitting their tenders, prequalified tenderers shall update the relevant information used at Prequalification to confirm that they continue to comply with the qualification criteria and verify that the information previously provided is still valid and correct. A tenderer may be disqualified at the time of the Contract award if it no longer meets the qualification requirements.
- c) The formation of a new JVCA after Prequalification, any change in a prequalified JVCA or prequalification of any individual partners of a dissolved prequalified JVCA shall be subject to the written approval of the Client prior to the deadline for submission of tenders.



## Section II: PRELIMINARY TERMS OF REFERENCE

Provision of a Pension Administration System for Public Service Pension Fund

### 1. Introduction

The Public Service Pension Fund intends to prequalify competent software vendors who shall then be issued with a detailed tender document in the secondary procurement stage. PSPF, responsible for the administration of public civil servants in Eswatini, invites expressions of interest (EOI) from qualified software vendors for the provision of a comprehensive pension administration system.

### 2. Background on the Client

The Public Service Pensions Fund (Fund) is a statutory body established in terms of Pensions Order No.13 of 1993 for the management and administration of pensions for public servants. The Fund is a contributory defined benefit (DB) scheme, in which members contribute five (5%) percent of their pensionable salary whilst the employer contributes an amount equal to fifteen (15%) percent of each member's pensionable salary.

The Fund provides retirement annuities, death benefits, disability benefits and other pension-related benefits for its members and their dependents and is approved as a pension fund in terms of the Pension Order, 1993.

The Fund is the largest pension fund in Eswatini and a prominent regional player in the pension fund industry. As at 31 March 2023, it had 40,594 active pensionable members and 26,363 pensioners and beneficiaries.

### 3. Background of the Assignment

The PSPF is committed to continuous improvement and seeks to modernize its core systems to enhance efficiency, accuracy, and security in managing pension administration processes. We require a robust and scalable pension administration system specifically designed to cater to the complexities of pension fund management.

### 4. Requirements for the Assignment

The ideal pension system should offer the following functionalities:

- Member Data Management.
- Contribution Processing.
- Benefit Calculations
- Payment Processing
- Document and Workflow Management

### 5. Evaluation Criteria

Bare in mind that this is a prequalification stage. General description of options/system capabilities shall suffice for this stage of procurement.

EOIs will be evaluated based on the following criteria:

- **Preliminary Examination:** on a PASS/FAIL basis to ensure compliance documents and bid validity as required by Section 40 of the Procurement Act, 2011.
- **Financial Capacity:** The applicant shall demonstrate that it has access to, or has available, liquid assets, unencumbered real assets, lines of credit, and other financial means sufficient to execute the resulting contract taking into account the applicant's commitments in other contracts. Evaluation shall be on PASS/ FAIL on this factor.



- **Experience & Expertise** : Proven track record in delivering and implementing pension management systems for organizations of similar size and complexity.
- Relevant and fit of suggested solution(s): Demonstrated understanding of design and setting up and running of pension or similar software.
- **Technical Capabilities** : Strong technical resources for the execution of the contract.
- **Client References** : Satisfactory references from past clients who have implemented similar pension management ERP systems.

The EOI document should include the following information:

- Company Profile
- A brief overview of your company and experience in providing pension management systems.
- A description of your proposed solution(s), including its key features and functionalities.
- Information on successful implementations of similar systems for pension funds (mentioning client names if possible).
- References from at least four (4) reputable clients who have implemented similar pension administration management systems.

## 6. Qualification and Evaluation Criteria

Each applicant has to first be substantially responsive to the binary(PASS/FAIL) Preliminary and Financial evaluation,prior to qualifying for the technical evaluation which shall be scored on a combination of factors as detailed in the terms of reference and evaluation criteria.

The **Pass Mark** for the technical evaluation is **70%**

### a) Preliminary Evaluation Table

<b>PRELIMINARY</b>	<b>The following are MANDATORY, absence of one may lead to</b>
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<p><b>EXAMINATION</b></p> <p><b>Evaluated on</b></p> <p><b>PASS/FAIL basis</b></p>	<p><b>rejection of the bid/proposal.</b></p> <ol style="list-style-type: none"> <li>1. A valid copy of a trading license</li> <li>2. Original Tax Compliance Certificate</li> <li>3. Proof of Payment of Tender Fee</li> <li>4. Police clearance for directors of bidding organization</li> <li>5. Completed Application Form</li> <li>6. A certified copy of an official statement of the annual summary of shares (Form C)</li> <li>7. A certified copy of an official statement of directors, alternate directors (Form J)</li> <li>8. A certified copy of identity documents of the bidding organization's directors</li> <li>9. Original Labour Compliance Certificate</li> <li>10. Power of Attorney for nominee in JVCA and statement of JVCA</li> <li>11. Compliant Bid validity of 90days</li> </ol>
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## b) Financial Capacity Evaluation

*Please attach audited financial statements*

The financial statements shall:

- (a) Demonstrate availability of liquidity to execute the resulting contract
- (b) reflect the financial situation of the Applicant or partner to a JV, and not sister or parent companies.
- (c) be audited by a certified accountant.
- (d) be complete, including all notes to the financial statements.

correspond to accounting periods already completed and audited (no statements for partial periods shall be requested or accepted)

1. Financial data for the last three years:

Financial information in (in ZAR/SZL)	Year 1	Year 2	Year
Total Assets (TA)			
Total Liabilities (TL)			
Net Worth (NW)			
Current Assets (CA)			
Current Liabilities (CL)			
Working Capital (WC)			
Total Revenue (TR)			
Profits Before Taxes (PBT)			

2. Sources of Finance

*[The following table shall be filled in for the Applicant and all parties combined in case of a Joint Venture]*

Specify sources of finance to meet the cash flow requirements on contracts currently in progress and for future contract commitments.

No.	Source of finance	Amount (ZAR/SZL)
1		
2		
3		



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c.Technical Experience	Criteria	Points
For specific experience, evidence shall include successful experience in the execution of <b>at least 2 large software projects</b> of a similar nature during the <b>last 10 years</b> . And at least 2 other projects which are still under the supervision of firm in the last 5 years		
<b>A.</b>	<b>General experience</b>	<b>30</b>
i	General experience: Firm has been offering software solutions for the last ten years in industries: Provide Traceable reference	30
<b>B.</b>	<b>Specific experience</b>	<b>70</b>
i	Team and their qualification for that is relevant to setting up such projects	15
ii	<ul style="list-style-type: none"> <li>• A description of your proposed solution(s), including its key features and functionalities.</li> <li>• Information on successful implementations of similar systems for pension funds (mentioning client names if possible).</li> </ul>	40
iii	Strategies on knowledge transfer, adoption and training of client's team	15
<b>Total Points</b>		<b>100</b>

### Section III- Returnables Forms

#### a. Application Submission Letter (in firm’s letterheads)

Date: \_\_\_\_\_

EOI \_\_\_\_\_

To: **Public Service Pension Fund**

We, the undersigned, apply to express our interest in the reference procurement and declare that:

- (a) **No reservations:** We have examined and have no reservations to the Prequalification Document, including any Addenda issued in accordance with clause 7 of ITA;
- (b) **Validity of Application:** the application shall valid and open for acceptance for.....days from the deadline for submission.
- (c) **No conflict of interest:** We have no conflict of interest in accordance with ITA 5;
- (d) **Eligibility:** We (and our JVCA partners ) meet the eligibility requirements as stated ITA 4 read with Section 40 of the Procurement Act,2011; we have not been suspended by the Employer based on execution of a Bid/Proposal Securing Declaration in accordance with ITA 4.10;
- (e) **Suspension and Debarment:** We, along with any of our subcontractors, suppliers, consultants, manufacturers, or service providers for any part of the contract, are not subject to, and not controlled by any entity or individual that is subject to, a temporary



suspension or a debarment imposed on grounds of Section 55 of the Procurement Act, 2011 or similar laws in our home countries.

- (f) **Not bound to accept:** We understand that you may cancel the prequalification process at any time and that you are neither bound to accept any Application that you may receive nor to invite the prequalified Applicants to Bid for the contract subject of this Prequalification process, without incurring any liability to the Applicants, in accordance with ITA 19.
- (g) **True and correct:** All information, statements and description contained in the Application are in all respect true, correct and complete to the best of our knowledge and belief.

Signed *[insert signature(s) of an authorized representative(s) of the Applicant]*

Name and designation \_\_\_\_\_

Firm's Name \_\_\_\_\_

Signature and date \_\_\_\_\_

## b. Organization of the Consultant

**Re: Consulting Services for *[insert assignment]***

**Ref: *[insert]***

*[Provide a brief description of the background and organization of your firm/entity. Include the*



*organization chart of your firm/entity. The EOI must demonstrate that the consultant has the organizational capability and experience to carry out the assignment. The qualifications document shall further demonstrate that the consultant has the capacity to field and provide experienced replacement personnel on short notice.*

Name of the firm	
Date of establishment	
Country of registration	
Full address of the firm	
Focal point: name, position, contact information (telephone, email):	Name:
	Tel:
	Email:
Number of branches	
Country(ies) of operations with number of branches in each country	
Number of full-time employees	
Number of part-time employees	
Field(s) of expertise of the firm	
Number of professional staff with experience related directly to the assignment	
Subsidiary and associated companies ( <i>wherever applicable</i> ): (details in the following format to	



<p>be provided for all associates) –</p> <ul style="list-style-type: none"> <li>(i) Name of the company</li> <li>(ii) Nature of business</li> <li>(iii) Address of the company</li> <li>(iv) Website of the company</li> <li>(v) Brief description of company (maximum of 120 words)</li> </ul>	
<p>Any other information that the consultant would like to add:</p>	

