



**APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE AN ELECTRONIC
BOARDPACK SOFTWARE AND THE MAINTENANCE OF THE SOFTWARE OVER
A PERIOD OF THIRTY-SIX (36) MONTHS.**

REFERENCE NUMBER: PASA-RFQ-2027-02

ISSUED DATE: 23 JUNE 2026

CLOSING DATE AND TIME: 03 JULY 2026 AT 12:00 PM

RFQ VALIDITY PERIOD: 90 DAYS FROM THE CLOSING DATE

EMAIL ADDRESS FOR SUBMISSIONS: procurement@petroleumagencysa.com

REQUEST FOR QUOTATIONS (RFQ)
REFERENCE NUMBER: PASA-RFQ-2027-02

1. INTRODUCTION

The “South African Agency for Promotion of Petroleum Exploration and Exploitation (SOC) Limited” known as “Petroleum Agency SA” is the designated agency in terms of section 70 of the Minerals and Petroleum Resources Development Act, (Act 28 of 2002). Petroleum Agency SA promotes onshore and offshore petroleum exploration for production, and optimal development thereof on behalf of the Government of the Republic of South Africa.

Petroleum Agency SA (the Agency) also regulates exploration and production activities and acts as the custodian of the national petroleum exploration and production database. Also, when the need arises, Petroleum Agency SA carries out strategic research projects to advise the ministries of minerals and energy on matters related to the sustainable development of Oil and Gas in the country.

For more information on the company, you can visit our current website:
www.petroleumagencysa.com.

Petroleum Agency SA has a staff complement of approximately 90 employees, and it operates from its head office based at:

Heron Place
Heron Crescent
Century City
Cape Town
7441

2. PURPOSE

The purpose of this Request for Quotation (RFQ) is to appoint a suitably qualified and experienced service provider for the provision of Electronic Board Pack Software and the maintenance of the software over a period of thirty-six **(36) months**, in accordance with the principles of efficient, economic, and effective use of public resources, as required by section 38(1)(b) of the Public Finance Management Act, 1999 (PFMA).

This system is intended to digitise board and committee meeting processes, enhance governance practices, and reduce reliance on manual documentation, while enabling secure, efficient and collaborative decision-making by the Board and Executive Management

3. SCOPE OF REQUIREMENTS

The detailed specification is provided in **Annexure A**.

4. PRICING

- The price quoted for the proposed solution should be (Inclusive of VAT), and in South African Rand currency and firm for a period of at least 90 days from closing date.
- Products / services offered should conform to Petroleum Agency SA specifications.

5. DEADLINE FOR SUBMISSIONS

The deadline for the submission of this RFQ is 12:00 PM on **03 July 2026**. Responses received after the closing date and time will not be accepted for consideration.

6. EVALUATION CRITERIA

6.1 PHASE 1

Administrative Evaluation Criteria

Initial Screening Process: At this phase bidder's response are reviewed to check if bidders have responded according to PASA RFQ document.

Required Documents	Non-submission may result in disqualification	
SBD1- Invitation to Bid	Yes	Must be completed and signed
SBD4 - Declaration of Interest	Yes	Must be completed and signed
SBD6.1- Preference Claim Form and Certified copy of B-BBEE Certificate or Affidavit	No	Non-submission will lead to zero (0) score on specific goals. "In instances where there are inconsistencies in a BBEE AFFIDAVIT received i.e. percentages not tying up, we will award zero points on specific goals"
Quotation	Yes	A detailed quotation must be submitted
Central Supplier Database (CSD) Registration Summary.	No	The service provider must be registered on the CSD. If not registered visit https://secure.csd.gov.za to complete the process prior to submission of proposal.
Valid Tax Compliance Status (TCS) Pin or Printed TCS report	No	PASA will not award any bid to a bidder who is not tax compliant.
Company Profile	No	Service provider to submit the company profile

Note: Bidder/s failing to meet the above administrative requirements may be eliminated and not be evaluated on mandatory phase.

6.2 PHASE 2

Mandatory Requirements

Compliance to specification

	Specification requirements	Comply	Not comply
1.	The proposed software must comply to the specification requirements detailed under Software requirements (Annexure A: Scope of requirements).		
	Comment:		

6.3 PHASE 3

Technical Evaluation Criteria

Bidders will be evaluated according to the below technical evaluation criteria. Minimum Technical **Threshold is 70%**. It must be noted that if the Bidder does not meet the **70% minimum threshold**, the bidder will be eliminated and not be evaluated further.

Technical Information	Scoring	Proof of documents	Weighting Percentage
6.3.1 Detailed Proposal and Methodology to achieve the desired results. Articulated technical proposal with deliverables, milestones, and timelines.			
The proposal exceeds expectations. The bidder has gone over and above to demonstrate how the scope of requirements are to be achieved and has included other important issues not stated in the scope of requirements.	5	Technical proposal	45%
A very good proposal designed to address all critical aspects of the scope of requirements to meet the desired result.	4		
Good/Satisfactory proposal , showing a good understanding of the scope of requirements. The proposal however minimally addresses critical aspects of the scope of requirements.	3		
Average proposal addressing some aspects of the scope of requirements but excluding critical aspects.	2		
Poor/Non-satisfactory proposal showing a complete misunderstanding of the scope of requirements as a whole	1		
No Technical proposal was submitted by the bidder	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
6.3.2 Project Teams' average experience with a demonstrated track record in Electronic Board Pack Software services.			
10 years and more average experience in Electronic Board Pack Software services.	5	CVs of the proposed team	15%
>8 but < 10 years' average experience in Electronic Board Pack Software services.	4		
8 years' average experience in Electronic Board Pack Software services.	3		
5 but < 8 years' average experience in Electronic Board Pack Software services.	2		
3 but < 5 years' average experience in Electronic Board Pack Software services.	1		
< 3 years' average experience in Electronic Board Pack Software services.	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
6.3.3 Project Team Lead Expertise: The team lead must have experience in software implementations.			
12 years' and more experience in software implementations.	5	CV of the proposed Team Lead	25%
>10 but < 12 years' experience in software implementations.	4		
10 years' experience in software implementations.	3		
8 but < 10 years' experience in software implementations.	2		
5 but <8 years' experience in software implementations.	1		
< 5 years' experience in software implementations.	0		

Technical Information	Scoring	Proof of documents	Weighting Percentage
6.3.4 Company Track Record and Past Performance The company must provide reference letters from different organisation's, proving Electronic Board Pack Software service received by the client. The reference letter(s) signed by the client must be on the client's letterhead and include the company name, contact person, and contact details (Email and/ telephone number)			
>8 relevant reference letters	5	Reference letter(s)	15%
6-8 relevant reference letters	4		
5 relevant reference letters	3		
4 relevant reference letters	2		
1-3 relevant reference letter	1		
Irrelevant or no reference letter submitted	0		

6.4 PHASE 4

Price and Specific Goals

All bids that meet the minimum 70% threshold will be evaluated further on preference point system.

Evaluation Criteria	Final Weighted Scores
Price	80
Specific goals	20
TOTAL SCORE:	100

Specific goals and points that may be claimed for this RFQ indicated below.

Evaluation Criteria	Points (20)
Black ownership	12
30% or more black women ownership	5
Any % ownership of designated group	3
TOTAL SCORE:	20

- Black ownership: 100% black full owned entities will score full 12 points
- Black ownership between 75%-99% will score 8 points
- Less than 75% but above 50% will score 6 points
-

7. BRIEFING SESSION

There will be no briefing session.

8. SUBMISSION AND COMPLETENESS OF PROPOSAL

Proposals must be clearly marked with the following:

- a. RFQ Number
- b. Description of services bidding for
- c. Name of the company (bidder)
- d. Closing Date of the Bid
- e. Email address for submissions: procurement@petroleumagency.sa

9. QUOTATION VALIDITY

Proposals shall remain valid for a period of 90 days after the closing date of the RFQ.

10. PREPARATION COSTS

The bidder will bear all its costs in preparing, submitting and presenting any response or proposal to this RFQ and all the other costs incurred by it throughout the bidding process.

11. SPECIAL CONDITIONS

Petroleum Agency SA reserves the right:

- 11.1 To award this RFQ to a bidder that did not score the highest total number of points, only in accordance with section 2(1) (f) of the PPPFA (Act 5 of 2000).
- 11.2 To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
- 11.3 To accept part of a bid rather than the whole tender.
- 11.4 To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid.
- 11.5 To correct any mistakes at any stage of the RFQ that may have been in the Bid documents

or occurred at any stage of the process.

11.6 To cancel and/or terminate the RFQ process at any stage, including after the Closing Date and/or after presentations have been made, and/or after quotations have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.

11.7 Award to multiple bidders based either on size or geographic considerations.

12. ENQUIRIES

For more information or enquiries relating to this RFQ, communication must be via e-mail to: procurement@petroleumagency.co.za.

13. PETROLEUM AGENCY SA REQUIRES BIDDERS TO DECLARE

In the Bidder's Technical response, bidder(s) are required to declare the following:

Confirm that the bidder(s) is to: –

- a. Act honestly, fairly, and with due skill, care and diligence, in the interests of Petroleum Agency SA;
- b. Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat Petroleum Agency SA fairly in a situation of conflicting interests;
- d. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- e. Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with Petroleum Agency SA.
- f. Avoidance of fraudulent and misleading advertising, canvassing and marketing;
- g. To conduct their business activities with transparency and consistently uphold the interests and needs of Petroleum Agency SA as a client before any other consideration; and
- h. To ensure that any information acquired by the bidder(s) from Petroleum Agency SA will not be used or disclosed unless the written consent of the client has been obtained to do so.

I, the undersigned have read the RFQ document number I further represent and warrant that I am empowered and duly authorized to execute this bid on behalf of the bidder and this offer will remain in effect for at least ninety (60) days from the closing date of the bid.

I, the undersigned, understand that Petroleum Agency SA is not bound to accept the lowest offer nor will any expenses incurred by the bidder in connection with preparing and submitting this bid be borne by Petroleum Agency SA.

SIGNATURE OF THE BIDDER

Signature(s) of Bidder or assignees(s)

Date

Name of Signing Person

Capacity

Name of Bidder (Company Name): _____

ANNEXURE A

SCOPE OF REQUIREMENTS

Acquisition of Electronic Board Pack Software

1. INTRODUCTION

1.1 Organisation and Overview:

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1.2 Purpose

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1.3 Key Requirements

1.3.1 Board pack licenses:

The solution must include 25 user licences for board members, executives, and administrative support staff.

1.3.2 Support Services:

- Provide **24/7 technical support** for the duration of the contract.
- Resolve issues related to **functionality, user access, software updates, and troubleshooting** within agreed turnaround times.
- Ensure **dual authentication integration** with both the entity's **Azure Entra ID/Active Directory** and the software's **own authentication mechanisms**, including **Multi-Factor Authentication (MFA)**.

1.3.3 Software updates:

- Provide **regular software updates and system maintenance** as part of the licensing fee.
- Updates must be aligned with technological advancements, cyber security threats, and end-user functionality improvements.

1.3.4 Software Requirements

Feature	Specification
Ease of Use	User-friendly interface requiring minimal training.
Accessibility	Compatible with various devices (desktop, tablet, mobile) and accessible via secure web and mobile applications.
Security	End-to-end encryption, granular access controls, role-based permissions, and audit trail capabilities.
Document Management	Secure document storage with version control, document tracking, and bulk upload/download.
Collaboration Tools	Ability for users to annotate documents, leave comments, and participate in secure discussion threads.

Feature	Specification
Search and Retrieval	Advanced search function across folders, documents, and meeting records.
Compliance and Governance	Must be compliant with relevant legislative and governance frameworks, including: POPIA (Protection of Personal Information Act), King IV governance principles, PFMA reporting requirements
Training and Support	Availability of initial training, ongoing user support, training materials, and knowledge base.
Backup and Recovery	Daily automated backup and business continuity plan for full disaster recovery.
Automation Functionality	Embedded Automation tools including: Automated generation of meeting minutes and action items, Smart agenda creation and distribution, Predictive insights for board decisions based on historical documentation

2. TECHNICAL PROPOSAL

Prospective service providers must submit a comprehensive technical proposal that addresses the following:

2.1 Proposal Content

Service providers must submit:

2.1.1 Detailed Scope of Services:

Description of the software's full capabilities, features, and compliance with the specifications above.

Details on AI-enabled functionalities and how they support efficiency in governance, minute-taking, and decision-making.

2.1.2 Implementation Plan:

A detailed project plan and implementation roadmap, including timeframes for setup, data migration, user training, and go-live support.

2.1.3 Service Level Agreement (SLA):

A proposed SLA covering response times, uptime guarantees, scheduled maintenance windows, and support procedures.

2.1.4 Data Security and POPIA Compliance:

A data governance framework aligned with POPIA and best practices in cybersecurity.

2.1.5 Risk Mitigation Measures:

Identification of key risks associated with implementation and use, and the provider's mitigation strategies.