

Request for Proposals (RFP)

The provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years.

RFP No. 3576/12/06/2023

Date of Issue	Friday, 26 May 2023	
Compulsory Briefing Session and Site Inspection	Date and Time	N/A
	Address	
Enquiries	Strategic Procurement Unit	E-mail: tender@csir.co.za
	Please use RFP No and RFP Description as subject reference	
Last date for submission of enquiries/clarifications	Date: Friday, 02 June 2023	
	Time: 16H30	
Electronical Submission	tender@csir.co.za (If tender submission exceeds 25MB multiple emails can be sent)	
CSIR business hours	08h00 – 16h30	
Category	Professional Services	
Closing Date and Time	Date: Monday, 12 June 2023	
	Time: 23H30	

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RFP STRUCTURE

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SECTION A

GENERAL RFP TERMS AND CONDITIONS

1 INTRODUCTION

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, the CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

2 SUBMISSION OF PROPOSALS

- 2.1 All proposals are to be submitted electronically to tender@csir.co.za. No late proposals will be accepted.
- 2.2 All proposals will only be considered if received by the CSIR before the closing date and time (***as indicated on the cover page***). The CSIR business hours are between **08h00** and **16h30**.
- 2.3 All proposal submissions are to be clearly subject referenced with the **RFP number and RFP Description**. Proposals must consist of two parts, each of which must be sent in two separate emails with the following subject:

PART 1: Technical Proposal (Please indicated the RFP Number on each File/folder)

PART 2: Pricing Proposal, Specific Goals claim documentation: RFP No.: (Please indicated the RFP Number on each File/folder)

- 2.4 Proposals submitted must be signed by a person or persons duly authorised.
- 2.5 Proposals submitted at incorrect location and/or address, will not be accepted for considerations and where practicable, will be returned unopened to the Bidder(s).
- 2.6 Proposals received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, will be returned unopened to the Bidder(s).
- 2.7 All dates and times in this bid are South African standard time.
- 2.8 Any time or date in this bid is subject to change at the CSIR's discretion. The establishment of a time or date in this bid does not create an obligation on the part of the CSIR to take any

action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if the CSIR extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

- 2.9 Documents submitted via cloud solutions such as: WeTransfer, Google Drive, Dropbox, etc. will not be considered.
- 2.10 The naming / labelling syntax of files or documents must be short and simple.
- 2.11 The CSIR will award the contract to qualified bidder(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price, specific goals and objective criteria.

3 COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the RFP Conditions or setting of counter conditions by Bidders or qualifying any RFP Conditions will result in the invalidation of such bids.

4 FRONTING

- 4.1 Government supports the spirit of broad based black economic empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background the Government condemn any form of fronting.
- 4.2 The Government, in ensuring that Bidders conduct themselves in an honest manner will, as part of the RFP evaluation processes, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry / investigation, the onus will be on the Bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid / contract and may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten

years, in addition to any other remedies the CSIR may have against the Bidder / contractor concerned.

5 PRICING PROPOSAL

- 5.1 Pricing must be provided in South African Rand (including all applicable taxes less all unconditional discounts).
- 5.2 Prices that are subject to escalation and exchange rate fluctuations are to be clearly indicated, with the currency and ROE used in the quotation must be clearly indicated.
- 5.3 Price should include additional cost elements such as travel cost, freight, insurance until acceptance, duty where applicable, etc.
- 5.4 Payment will be according to the CSIR Payment Terms and Conditions ([Link](#)).
- 5.5 Please provide a detail pricing using a Pricing Schedule/Bill of Quantities outlined under **Annexure D. Pricing must strictly be in accordance with the Pricing Schedule.**

6 APPOINTMENT OF SERVICE PROVIDER

- 6.1 The contract will be awarded to the bidder who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 6.2 Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement, CSIR reserves the right to appoint an alternative supplier.
- 6.3 Awarding of contracts will be published on the same platform where the bid was published, and no regret letters will be sent to unsuccessful bidders.

7 SERVICE LEVEL AGREEMENT

- 7.1 Upon award the CSIR and the successful bidder will conclude an agreement in line with applicable form of contract (i.e. [Draft Supplier Agreement](#)) regulating the specific terms and conditions applicable to the services being procured by the CSIR, more or less in the format of the draft Service Level Indicators (**Annexure J**) included in this tender pack.

Bidder(s) are requested to:

- a. Comment on draft Service Level Indicators and where necessary, make proposals to the indicators;

- b. Explain each comment and/or amendment; and
- c. Use an easily identifiable colour font or “track changes” for all changes and/or amendments to the Service Level Indicators for ease of reference.

The CSIR reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable to the CSIR or pose a risk to the organisation.

8 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFP shall be submitted in writing to CSIR to the email and format outlined in the table on cover page of this RFP document.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

9 MEDIUM OF COMMUNICATION

All documentation submitted in response to this RFP must be in English.

10 CORRECTNESS OF RESPONSES

The bidder must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.

The bidder accepts that any mistakes regarding prices and calculations will be at their own risk.

11 VERIFICATION OF DOCUMENTS

Bidders should check the numbers of the pages to satisfy themselves that none is missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.

Pricing schedule and specific goals credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

12 RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid. In the event that the CSIR allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and the CSIR will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.

13 ADDITIONAL TERMS AND CONDITIONS

A bidder shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.

Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

In case of proposal/s from a joint venture, the following must be submitted together with the proposal/s:

- A joint venture agreement signed by both parties clearly indication the lead partner, including split of work;
- Copy of a valid certificate or consolidated B-BBEE score card;
- The Tax Compliance Status (TCS) or CSD Report of each joint venture partner;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificate/s.

An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.

No goods and/or services should be delivered to the CSIR without an official CSIR Purchase order or signed supplier agreement. The CSIR purchase order number must be quoted on the invoice. Invoices without CSIR purchase order numbers will be returned to supplier.

Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

14 SPECIAL CONDITIONS

The CSIR reserves the right to:

- 14.1 Extend the closing date of this RFP;
- 14.2 Correct any mistakes before closing date and time of the tender that may have been in the Bid documents or occurred at any stage of the tender process;
- 14.3 Verify any information contained in the bidder's submission;
- 14.4 Request documentary proof regarding the bidder's submission;
- 14.5 Carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the product/service offered by the bidder(s) or verify any information whether before or after the adjudication of this RFP;
- 14.6 Award this tender 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);
- 14.7 Request audited financial statements or other documents for the purpose of a due diligence exercise to determine if the bidder will be able to execute the contract;
- 14.8 Award this RFP as a whole or in part;
- 14.9 Award this RFP to multiple bidders;
- 14.10 Cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such;
- 14.11 Post tender negotiate on any elements on the bid, including but not limited to technical, transformation, price, and contractual terms and conditions.;
- 14.12 Not to award a contract to a bidder who is associated with a security breach that materially adversely affects other entities or if any directors or officers of a bidder are formally accused of fraudulent or illegal conduct which, would harm the CSIR's reputation by its continued association with the bidder.

15 CONFLICT OF INTEREST, CORRUPTION AND FRAUD

The CSIR reserves its right to disqualify any bidder who either itself or any of whose members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of CSIR or any other government organ or entity and whether from the Republic of South Africa or otherwise ("Government Entity")

- a. engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid;
- b. seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- c. makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- d. accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a Government Entity;
- e. pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
- f. has in the past engaged in any matter referred to above; or
- g. has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.

16 MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

The bidder should note that the terms of its Tender will be incorporated in the proposed contract by reference and that the CSIR relies upon the bidder's Tender as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder.

It follows therefore that misrepresentations in a Tender may give rise to service termination and a claim by the CSIR against the bidder notwithstanding the conclusion of the Service Level Agreement between the CSIR and the bidder for the provision of the Service in question. In the event of a conflict between the bidder's proposal and the Service Level Agreement concluded between the parties, the Service Level Agreement will prevail.

17 PREPARATION COSTS AND LIMITATION OF LIABILITY

The Bidder will bear all its costs in preparing, submitting and presenting any response or Tender to this bid and all other costs incurred by it throughout the bid process. Furthermore, no statement in this bid will be construed as placing the CSIR, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidder(s) in the preparation of their response to this bid.

A bidder participates in this bid process entirely at its own risk and cost. The CSIR shall not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the Bidder's participation in this Bid process.

18 INDEMNITY

If a bidder breaches the conditions of this bid and, as a result of that breach, the CSIR incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds the CSIR harmless from any and all such costs which the CSIR may incur and for any damages or losses the CSIR may suffer.

19 PRECEDENCE

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

20 TAX COMPLIANCE

No tender shall be awarded to a bidder who is not tax compliant. The CSIR reserves the right to withdraw an award made, or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was in fact not tax compliant at the time of the award or has submitted a fraudulent Tax Clearance Certificate to the CSIR, or whose verification against the Central Supplier Database (CSD) proves non-compliant. The CSIR further reserves the right to cancel a contract with a successful bidder in the event that such bidder does not remain tax compliant for the full term of the contract.

21 TENDER DEFAULTERS AND RESTRICTED SUPPLIERS

No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appear on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. The CSIR reserves the right to withdraw an award, or cancel a contract concluded with a Bidder should it be established, at any time, that a bidder has been blacklisted with National Treasury by another government institution.

22 GOVERNING LAW

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this bid, the bid itself and all processes associated with the bid.

23 CONFIDENTIALITY

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's

tender(s) will be disclosed by any bidder or other person not officially involved with the CSIR's examination and evaluation of a Tender.

No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a Tender. This bid and any other documents supplied by the CSIR remain proprietary to the CSIR and must be promptly returned to the CSIR upon request together with all copies, electronic versions, excerpts, or summaries thereof or work derived there from.

Throughout this bid process and thereafter, bidder(s) must secure the CSIR's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this bid relates; or (ii) the process which follows this bid. Failure to adhere to this requirement may result in disqualification from the bid process and civil action.

24 AVAILABILITY OF FUNDS

Should funds no longer be available to pay for the execution of the responsibilities of this bid, the CSIR may terminate the Agreement at its own discretion or temporarily suspend all or part of the services by notice to the successful bidder who shall immediately make arrangements to stop the performance of the services and minimize further expenditure: Provided that the successful bidder shall thereupon be entitled to payment in full for the services delivered, up to the date of cancellation or suspension.

25 PERSONAL INFORMATION

25.1 Each Party consents to the other Party holding and processing "personal information" (as defined in the POPI Act) relating to it for legal, personnel, administrative and management purposes (including, if applicable, any "special personal information" relating to him/her, as defined in the POPI Act). Notwithstanding the generality of the aforesaid, each Party hereby undertakes to comply with all relevant provisions of the POPI Act and any other applicable data protection laws. The bidder further agrees to comply with all CSIR's reasonable internal governance requirements pertaining to data protection.

- 25.2 Each Party consents to the other Party making such information available to those who provide products or services to such parties (such as advisers, regulatory authorities, governmental or quasi-governmental organisations and potential purchasers of such Party or any part of their business).
- 25.3 While performing any activity where a Party is handling personal information as a “responsible party” (as defined in the POPI Act), each Party undertakes that it will process the personal information strictly in accordance with the terms of the POPI Act, this Contract, and the other Party’s instructions from time to time, and take appropriate operational measures to safeguard the data against any unauthorised access.
- 25.4 Each Party acknowledges that in the course of conducting business with each other, each Party intends to maintain and process personal information about the other Party in an internal database. By signing this Contract, each Party consents to the maintenance and processing of such personal information.
- 25.5 Where relevant, the bidder shall procure that all of its personnel, agents, representatives, contractors, sub-contractors and mandataries shall comply with the provisions of this clause 25 (Personal Information). The CSIR shall be entitled on reasonable notice to conduct an inspection or audit bidders’ compliance with the requisite POPI Act safeguards.

26 DISCLAIMER

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, bidders shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to bidder concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the bidder or any other party in connection therewith.

SECTION B

EVALUATION METHODOLOGY

27 TERMS OF REFERENCE

This RFP is for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years. The service offering must include all requirements as set out in **Annexure B**.

28 EVALUATION CRITERIA

The CSIR has set minimum standards that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

Elimination Criteria (Phase 1)	Technical Evaluation Criteria (Phase 2)	Price and Preference Points Evaluation (Phase 3)	Objective Criteria
Only bidders that comply with ALL the criteria set on paragraph 27.1 on Phase 1 below will proceed to Technical/Functional Evaluation (Phase 2).	Bidder(s) are required to achieve a predetermined minimum threshold on each of the individual criteria, and a predetermined minimum threshold on 100 points overall. Only bidder (s) who met and/or exceeded the minimum threshold points on Phase 2 below will proceed to Price and Preference Points Evaluation. (Phase 3)	Bidder(s) will be evaluated out of 100 points i.e., 80 points for Price and 20 points for Preference Points.	Bidder(s) may be evaluated further on Objective Criteria in accordance with Section (2) (1) (f) of the PPPFA (Act 5 of 2000).

28.1 Elimination Criteria (Phase 1)

Proposals will be eliminated under the following conditions:

- Bidder that submits late bids will not be considered.
- Bidder that submits to the incorrect location or email address will not be considered (Only electronic submission to tender@csir.co.za would be considered).
- Bidder that is listed on the NT database of restricted suppliers will not be considered.
- Bidder that is registered on the NT Register of Tender Defaulters will not be considered.
- Bidder that did not submit mandatory returnable documents as listed on **Annexure E: Proposal Form and List of Returnable Documents (Mandatory Returnable Documents Table)**.

28.2 Technical Evaluation Criteria (Phase 2)

The evaluation of the functional / technical detail of the proposal will be based on the following criteria:

No	ELEMENT	ELEMENT DESCRIPTION	WEIGHT
1.	Company Experience	<ul style="list-style-type: none"> • The bidder must have a minimum of five (5) years in passenger and goods lift maintenance services. • The service provider must attach profile detailing experience in passenger and goods lift maintenance services. The profile must not be longer than 10 pages. 	20
2.	Reference Letters	<ul style="list-style-type: none"> • Bidders must submit a minimum of three (3) contactable reference letters for completed projects for provision of passenger and goods lift maintenance services. Projects must have been completed between 2012 and 2023. (<i>Purchase orders, contracts and appointment letters will not be considered</i>). • Reference letter submitted must be accessible and will be vetted. • The references letters must have the following details: <ol style="list-style-type: none"> i. The reference letter must be on official company letterhead. ii. The reference letter must indicate the description of the services and date of the service provided, and value of the transaction or contract. iii. The reference letter must have email address and telephone number. iv. The reference letter must be dated and signed. 	30
3.	CV of Field Engineer	Detailed CV of the Field Engineer with a minimum of 5 years' experience in passenger and goods lift maintenance services <i>and</i> indicate clear responsibilities.	10
4.	CV of the Lift Mechanic	Detailed CV of the Lift Mechanic with a minimum of 5 years' experience in passenger and goods lift maintenance services <i>and</i> indicate clear responsibilities.	10
5.	Implementation / methodology approach	<ul style="list-style-type: none"> • Bidders must submit a proposed implementation methodology that is aligned to 	30

		<p>the scope of work, highlighting the risks and mitigation measures and qualify plan.</p> <ul style="list-style-type: none"> • Bidders must submit a proposed required solution. This must include actual process on how the passenger and goods lift maintenance services and equipment will be carried out. • Bidders must include / list their company resources, safety plans etc. • Bidders must include after-hours support and management of call outs. 	
TOTAL (%)			100

Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **70 %** and less than **50%** on each of the individual criteria will be eliminated from further evaluation on Price and Preference Points Evaluation.

Refer to **Annexure C (Technical Evaluation Matrix/Rubrics)** for the scoring ranges/rubrics that will be used to evaluate functionality.

28.3 Price and Preference Points Evaluation (Phase 3)

Only Bidders that have met meet minimum thresholds on Technical/functional Evaluation will be evaluated for price and preference points. Price and Preference Points will be evaluated as per **Annexure G: Preference Points Award Form**.

29 OBJECTIVE CRITERIA

The CSIR reserves the right to award this tender to a bidder that did not score the highest total number of points in accordance with Section (2) (1) (f) of the PPPFA (Act 5 of 2000)", under the following conditions:

- The directors, shareholders or officers of the bidder must not be formally charged of fraudulent or illegal conduct which could harm the CSIR's reputation by associating with the bidder.

30 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

Respondents are required to self-register on National Treasury's Central Supplier Database (CSD) which has been established to centrally administer supplier information for all organs of state and facilitate the verification of certain key supplier information. Business may not be awarded to a Respondent who has failed to register on the CSD. Only foreign suppliers with no local registered entity need not register on the CSD. In order to enable the CSIR to verify information on the CSD, Respondents are required to provide the unique registration reference number.

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: www.csd.gov.za;
- provide the CSIR of their CSD registration number.

Annexure A

Standard Bidding Document (SBD) 1

PART A: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CSIR					
BID NUMBER:	3576/12/06/2023	CLOSING DATE:	12 June 2023	CLOSING TIME:	23H30
DESCRIPTION	RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT CSIR SCIENTIA CAMPUS					
The CSIR requires that all tender submissions be submitted electronically to tender@csir.co.za . Should tender file size exceed 25MB, bidders submit tender in multiple emails. Use the tender number 3576/12/06/2023 and description of the tender as the subject on your email.					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Strategic Procurement Unit		CONTACT PERSON	Strategic Procurement Unit	
TELEPHONE NUMBER	012 841-2911		TELEPHONE NUMBER	012 841-2911	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	tender@csir.co.za		E-MAIL ADDRESS	tender@csir.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
1 ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		2 ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? YES NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? YES NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? YES NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B: TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
 (Proof of authority must be submitted e.g., company resolution)

DATE:

Annexure B

Technical Specification/Scope of Services for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No. 3576/12/06/2023

1 INVITATION FOR PROPOSAL

Proposals are hereby invited for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years.

The purpose of the Request for Proposal (RFP) is to obtain capability, pricing and general information on the business of potential Contractors for the CSIR to determine the Contractors most capable of providing the service.

This RFP document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required by the CSIR.

This RFP does not constitute an offer to do business with the CSIR, but merely serves as an invitation to bidder(s) to facilitate a requirements-based decision process.

Responses to this Request for Proposal (RFP) (hereinafter referred to as a Bid or a Proposal) are requested from suitably qualified entities (hereinafter referred to as a Respondent or Bidder) for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years.

2 PROPOSAL REQUIREMENTS

All proposals are to be submitted in a format specified in this enquiry however, bidders are welcome to submit additional / alternative proposals over and above the originally specified format.

2.1 Technical Proposal

The following must be submitted as part of the **technical** proposal:

- a. Bidders must submit a cover letter on company letterhead and a company profile limited to ten pages.

- b. Bidders must submit a minimum of three (3) reference letters for passenger and goods lift maintenance services that they have completed between 2015 and 2023. The references submitted must be accessible for vetting.
- c. Bidders should submit a detailed CV of their *Field Engineer* in managing similar projects, provision of passenger and goods lift maintenance services. The CV should include qualifications/registrations and work experience.
- d. Bidders should submit a detailed CV of their *Lift Mechanic* in passenger and goods lift maintenance services. The CV must indicate clear responsibilities and number of years of work experience.
- e. Bidders should submit an implementation and methodology approach indicating how they will execute the project.

2.2 Financial Proposal:

The following must be submitted as part of the **financial** proposal:

- Cover Letter.
- Completed Pricing Schedule (**Annexure D**) on official company letterhead.
- CSD registration report (RSA suppliers only).

3 PROPOSAL SPECIFICATION

3.1 Scope of Work

The CSIR requires the service provider to perform a comprehensive maintenance service (type B contract) to the lifts installed in Pretoria, Stellenbosch, and Durban, with due regard for the age of the lifts. The service provider will be required to:

- 3.1.1 Systematically examine the equipment in accordance with the lift regulations/ standards and the Manufacturer's requirement at monthly intervals.
- 3.1.2 Ensure that maintenance work of a technical nature shall be performed by "Competent" persons as defined by the Occupational Health and Safety Act who are qualified Lift Mechanic/s experienced and skilled in maintaining equipment similar to which are subject matter of this request and who are employed and supervised by the service provider. CSIR reserves the right to request and be granted copies of certificates of qualification/ competence for the Lift Mechanic/s or Senior Technical personnel.

- 3.1.3 Not to permit the Maintenance Agreement to be assigned, transferred, or modified without the prior written approval of CSIR.
- 3.1.3 To perform the maintenance and repair work required in terms of the Maintenance Agreement during regular working hours being Monday to Friday during the hours of 08:00 to 16:30, statutory holidays excluded, except in the case of call-backs. Competent and qualified technicians shall perform all work of a technical nature.
- 3.1.4 To provide call out service twenty-four (24) hours a day, seven (7) days per week. The call-out service shall be carried out at no additional expense to CSIR unless caused by misuse or abuse of the equipment. Technicians shall be equipped with adequate communication equipment to ensure a minimum delay in the response to emergency call- backs.
- 3.1.5 To supply, repair and replace all parts of every description made necessary by normal wear and tear without expense to CSIR when such replacement or repair is deemed necessary by the service provider in accordance with the Maintenance Agreement and the manufacturer's requirements. Only parts that are correctly designed, manufactured, and suitable in all respects, shall be used.
- 3.1.6 To replace all parts timeously, thereby limiting the incidence of breakdowns, unplanned maintenance or repair and consequently maintain maximum equipment operation.
- 3.1.7 To ensure that within a one (1) month period after being appointed for the maintenance work, all wiring diagrams and other drawings of a technical nature related to the equipment are available for the sole use of the service provider, CSIR or its technical personnel. The wiring diagrams enclosed in plastic protection sleeves shall be located and retained in suitably sized and constructed steel cabinets/enclosures situated within the motor room/machine compartment.
- 3.1.8 To provide within a one (1) month period after being appointed for the maintenance work, a maintenance site register/record book located in the machine room and maintain accurate records of all service procedures, site visits, stoppages, break downs, planned repairs and safety related equipment operation tests and checks. This register shall become the property of CSIR and shall be kept in the motor room for a minimum period of ten (10) years as required by the Act.
- 3.1.9 To commence immediately on appointment for the maintenance work, to record all details as requested by a customer communication logbook (if so required and situated at a mutually agreed location) for effective two-way communication between

the CSIR Facilities Management staff and Service Provider personnel. This logbook shall accurately record each and every site visit and attention to complaints raised by either party, especially during the first year of this contract.

- 3.1.10 To provide, on request by CSIR or its duly appointed Agents, reports detailing a history of the equipment call-backs, repairs and break-down repairs to each and every lift.
- 3.1.11 To inform CSIR verbally and in writing and act immediately on any potentially hazardous or undesirable situation which may cause harm to persons, or which may damage or reduce the life expectancy of the equipment situated within the shaft, machine room, pit and sheave room, or in the immediate vicinity of the equipment, even if the hazardous or undesirable situation does not form part of the service providers responsibility.
- 3.1.12 To inform CSIR in writing at least forty-eight (48) hours prior to carrying out any planned major repair or modification to the existing equipment deemed necessary by the service provider, such as a rope-change, even if this modification may benefit the equipment or if the cost of this modification is for the service provider's account. Any ad hoc repairs shall only commence after receipt of an official PO from CSIR.
- 3.1.13 To carry out within a thirty (30) day period of being initially awarded the Lift Maintenance Agreement, Comprehensive "B" Report inspections and issue the necessary Certificates of Compliance. The winning bidder shall in addition to placing all the above documentation in its original form in the lift motor room, forward to the CSIR or their duly appointed Agent copies of same. This only applies in the event that the Contractor responsible for the maintenance Comprehensive "B" Report service is changed by way of a new appointment. ("Competent Person" in terms of the OHS Act re- appointment). The costs to make good the repair items identified by the Comprehensive "B" Report shall be for the account of the CSIR. Priority is given to the safety related items, but due consideration should be given to the quality-related items that may impact upon reliability and therefore the achievement of the service level commitments.

3.2 Inventory List

No	Site	Building	Lift	Location	Make	Registration number	Stops	Weight (kg)	Year of Manufacture	Age
1.	CSIR Pretoria	44	44 F East	F Block	Express (Otis)	PE3948	4	700	1973	49
2.	CSIR Durban	Durban	Durban	A Block	Otis	72NEO495	5	840	1972	50
3.	CSIR Pretoria	21	21 A	Entrance	Sabiem	PE4329	5	980	1976	46
4.	CSIR Pretoria	39	39 Executive	Executive	Sabiem	PE4302	4	700	1977	45
5.	CSIR Pretoria	46	46 A West	A Block	Sabiem	PE4579	4	900	1981	41
6.	CSIR Pretoria	46	46 D East	D Block	Sabiem	PE4578	4	1000	1981	41
7.	CSIR Western Cape	Stellenbosch	Stellenbosch	Link A & B Block	Thyssen	CTE 3185	3	900	1982	40
8.	CSIR Pretoria	14	14 F	Entrance	Thyssen	PE5550	4	1050	1988	34
9.	CSIR Pretoria	39	Ext	Executive	Thyssen	02/L5585	2	1000	2010	12
10.	CSIR Pretoria	43	A North	Entrance	Thyssen	02/11154	3	630	2010	12
11.	CSIR Pretoria	19	Stairclimber	Entrance	Vimec	124715	2	150	2007	15

3.3 Maintenance Objectives

Without in any way limiting service provider's obligations, the service provider shall always ensure:

- the safety and comfort of passengers using the equipment.
- the accuracy and reliability of the equipment performance.
- that preventative maintenance is always carried out.
- that the equipment and associated spaces are always kept clean and presentable.
- that the maintenance is carried out in a programmed sequence (Annual Preventative Maintenance Plan) to protect CSIR investment.

3.4 Performance Levels

3.4.1 Call-Back Rate

The winning bidder shall ensure that the frequency of equipment break-downs does not result in the target number of six (6) call-backs per unit per annum being exceeded. The fault analysis (call-back rate) shall be compiled by the Contractor on a monthly basis and assessed/calculated annually.

The twelve (12) month period used to assess the call-back rate shall be the period from the date or anniversary date of the commencement of the Maintenance Agreement to end of the month preceding the following anniversary date or per calendar year as agreed to in advance.

3.4.2 Down-time

The Contractor's Maintenance Plan shall be structured and implemented so as to ensure maximum equipment operation (i.e., availability and reliability) and the maximum downtime does not exceed four (4) hours per unit per month.

Note:

- a) Down-time is the period the equipment is not in operation due to equipment break-downs or unplanned repairs that are not due to vandalism or abuse.
- b) Planned repairs requiring an outage (alternatively, a n outage as a result of planned Repairs), will not be regarded as downtime on condition that the CSIR has approved in advance notification of such Planned Repairs.

3.4.3 Call-back Response Times

The service provider shall ensure at any time of the day or night, seven (7) days a week, inclusive of all statutory holidays, throughout the maintenance period, that Technicians are available to respond to call-backs with regards to emergencies or breakdowns of the equipment. The response times to call-backs shall be within the time period as set below and shall be the time the call is received by the service provider to the time the Technician arrives on site.

Maximum target – Call-back response times	Normal working hours	Outside normal working hours
Passenger entrapments (occupied stop)	30 minutes	45 minutes
Lift out of service (unoccupied stop)	60 minutes	90 minutes

3.5 Preventative Maintenance

3.5.1 Monthly Servicing

The service provider shall, monthly, systematically examine the equipment in accordance with all Regulations, the manufacturer's requirements and the service provider's Maintenance Plan, and perform the necessary adjustments, component replacements, cleaning and lubrication. All lubricants shall be of the proper grade for the purpose used and as specified by the manufacturer.

Maintenance work shall include but is not limited to the following:

- a) Examining, cleaning and equalizing tensions of all main, selector, governor, and compensation ropes. Renewing of all ropes, when the rope-wear or condition exceeds the manufacturer's specification and/or the OHS Act requirements with regards to the maintenance and discarding of wire ropes. The ropes shall always produce an acceptable lift operation and shall ensure an adequate safety factor.
- b) Repairing and/or replacing all electrical wiring and conductors extending to all parts of the equipment from the load side of the Main Breaker switch, distribution panels or other points of supply in the machine room.
- c) Keeping the guide rails clean and properly aligned to ensure smooth and quiet operation.
- d) All oil reservoirs/pots shall be kept properly sealed to prevent leakage and

dust ingress.

- e) To thoroughly test monthly, car and landing door locks mechanical and electrical, car door leading edge safety devices, emergency alarm bells, intercom, car door open buttons, and escalator handrail brush contacts and emergency stop switches.
- f) To visually inspect monthly, lift floor levels and pits, reporting on and attending to non-compliances.
- g) Keeping the motor room floor, exterior of the machinery and any other parts of the equipment, properly painted and presentable at all times.

3.5.2 Quarterly Servicing / 3-Monthly

- a) The pits shall be thoroughly cleaned at maximum three (3) monthly intervals except in the case of observation lifts with visible pits, in which case the pits shall be cleaned at least once every month.

3.5.3 Six Monthly Servicing

- a) To thoroughly test at maximum six (6) monthly intervals, buffer electrical safety contacts, safety gear electrical contacts, governor electrical contacts, emergency stop switches, and all escalator electrical safety contacts.
- b) To thoroughly inspect and report at maximum six (6) monthly intervals, the main hoisting ropes, including selector, governor and compensating ropes, as required by the Act.

3.5.4 Annual Servicing

- a) To thoroughly test and log at maximum twelve (12) monthly intervals, the car and counterweight safety gear, over-speed governors, ultimate limits, main brakes, and buffers.
- b) To thoroughly test by actuating the lift break-glass unit or fire signal at maximum twelve (12) monthly intervals, the lift emergency fire control operation (if fitted). The results and date of the test shall be recorded in the site maintenance register. CSIR or its duly appointed Technical Personnel shall be informed at least thirty (30) days prior to the test covered under this Section.
- c) To thoroughly test (if and where applicable) by simulation at maximum twelve (12) monthly intervals, the lift emergency stand-by power control operation (if

applicable). The results and date of the test shall be recorded in the site maintenance register. CSIR or its duly appointed Technical Personnel shall be informed at least thirty (30) days prior to the test covered under this Section.

3.6 Other Components

- a) The following components shall be included as part of the Preventative Maintenance at no additional cost to CSIR:
- Replacing of Lift car light lamps or fluorescent tubes, and all signal lamps
 - Lift shaft lighting (if applicable) - lamps or fluorescent tubes
 - Lift motor room lamps or fluorescent tubes
 - The monthly testing of the lift intercom system (where applicable) and initiating quotes for repairs when needed, provided that this intercom equipment was not originally installed by the Lift Manufacturer or Maintenance Contractor(s).

3.7 Maintenance Plan

- a) The Contractor shall prepare a detailed Maintenance Plan for the equipment, which the Client shall review and acknowledge, and which shall form an integral part of the Agreement.
- b) The Contractor shall perform the maintenance in accordance with the Maintenance Plan. Acceptance of the Maintenance Plan by the Client or its duly appointed Agents shall not limit in any way the Contractor's responsibility to undertake whatever tasks are required during the maintenance period to ensure achievement of the Maintenance Objectives and safe operation of the Lifts.
- c) The Maintenance Plan, which is an integral part of this Agreement, shall include, as a minimum, the month-by-month program for a five (5) year period detailing the work planned to be carried out on each item of equipment.
- d) The maintenance work shall be monitored and reported against the Maintenance Plan, and the terms and conditions of this Agreement. The Maintenance Plan shall be reviewed and updated as necessary by agreement between the parties.
- e) Where the Maintenance Plan is in conflict with this Agreement by way of offering a lesser service, this Agreement shall be deemed to supersede the Contractor's Maintenance Plan.
- f) The Maintenance Plan shall clearly indicate the safety procedures to be followed when passenger entrapment call-Backs are received. These procedures shall

include from the time the call-Back is received to the time the Lift is put back into operation.

3.8 Service Conditions

The successful bidder will be required to enter into a Maintenance Agreement with the CSIR which Agreement will cover, but not limited to, the following terms and conditions:

3.8.1 Exclusions from Service Provider Obligations

- a) The costs of call backs and repairs necessitated by reason of negligence other than the negligence of the service provider, their Employees or Agents and their misuse of the equipment, and excepting all normal fair wear and tear, shall be borne by CSIR. A breakdown of the charge, with specific reference to the amounts allowed for both Labour and material, shall be clearly indicated on the service providers quotation to CSIR, as also the percentage mark-up.
- b) Replacement components which are deemed not serviceable at the time the Maintenance Agreement is initiated or renewed shall be specified. All parts which have not been excluded under this Section shall be covered in terms of the Maintenance Agreement for the duration of the contract. The notification of excluded equipment can take the form of a list of all obsolete equipment or a specific list of excluded equipment pertaining to the previous service provider not having replaced this equipment within the former contract.
- c) The following items of the equipment are not included or covered under this Agreement unless their repair, replacement or adjustment can be attributed to the service providers omissions and/or negligence:
 - o The painting of the motor room wall and ceiling.
 - o Motor room, car, shaft and pit light fittings, doors, windows, and motor room mechanical ventilation.
 - o Car enclosures, hoist way enclosures.
 - o Car and landing door panels, surrounds, frames, architraves, and sills, unless attention may further be required as a result of incorrect running clearances.
 - o Decorative finishes, wall panels, suspended ceilings, light diffusers, handrails, mirrors, glass sides, glass doors, carpets or floor coverings.
 - o Telephone, closed circuit television systems, power generating plants, security

equipment.

- d) At an additional cost to CSIR the service provider may be requested to install any additional equipment or accessories to the equipment which is recommended or required by the government, provincial, municipal or any other authority under new legislation. Should any form of Labour and/or material be required on any of these excluded components, these costs will be brought to the attention of CSIR via a detailed written quotation who will then provide a separate order to cover these costs.

3.8.2 Obligations of the CSIR

CSIR agrees and undertakes:

- a) To issue the necessary operating instructions and procedures to building occupants to always ensure that the lift equipment will be used in a reasonable manner.
- b) To advise the service provider immediately when the equipment malfunctions or becomes inoperative.
- c) Not to authorise or allow any person/s other than the service provider or their duly authorised employees to carry out any maintenance work on the equipment during the currency of the Agreement unless prior written consent from the service provider has been obtained. Should any work be carried out by any other company or person, prior to or during the term of the Agreement, the service provider shall not be liable for any act, occurrence or omission on the part of such company or person/s or equipment supplied.
- d) To immediately notify the service provider of any incident, injury or harm to any person or property resulting from the usage of the equipment and to make available all relevant information pertaining to equipment incidents.
- e) To ensure that the service providers workmen shall at all reasonable times have free and undisturbed access to the equipment for the effective execution of normal maintenance procedures as well as emergency after-hours callout services in accordance with the Maintenance Agreement.
- f) To ensure that the building with regards to the lift equipment complies with the applicable Regulations and local by-laws.

3.8.3 Equipment Modernisation

- a) Should any lift equipment be modernised in future after commencement of the Maintenance Agreement, CSIR reserves the right to request tenders from and appoint any contractor of its choice for the specified modernisation or upgrade works, provided that the contracted service provider is given the opportunity to tender for the modernisation on an equal basis.
- b) Should the modernisation be awarded to a third party (not the service provider), the service provider shall be given ninety (90) days' notice of the modernisation hand over and commencement date and shall thereafter assume no responsibility of any nature for the safety of any person/s or goods affected by the lift so handed over to the third party.
- c) On completion of the equipment modernisation by the third party and prior to the service provider continuing with the maintenance of the modernised equipment, the service provider shall carry out a detailed inspection of the said equipment to verify that the modernisation works in no way affects the service providers ability to continue effectively maintaining the equipment under the Maintenance Agreement. Should the service provider be unable to continue with the Maintenance Contract for any reason whatsoever, he shall give thirty (30) days' notice to CSIR. In this case CSIR will *not* need to compensate the service provider for any losses sustained due to the cancellation of the contract.

3.8.4 Lifts Replacement

- a) The CSIR has embarked on a lift replacement programme, and some lifts on this tender shall fall out of the maintenance requirements of this RFP, as they are installed.

3.8.5 Inspections

3.8.5.1 CSIR or its duly appointed Agents shall retain the right to, at any time, order a service and/or safety quality audit inspection and or risk assessment in order to:

- a) Witness and/or verify the performance of any maintenance work by the service provider at any time, or to gauge the safety performance and statutory compliance of the equipment.
- b) The service provider shall not be liable for the costs of these inspections.

However, should the inspections highlight any contractual or statutory non-conformance on the service providers part, he shall be liable for the corrective action costs of both labour and material to remedy the stated non-conformance.

3.8.5.2 The service provider shall carry out the following annual inspections/surveys:

- a) To enable the service provider to effectively monitor the equipment's maintenance, detailed annual audit inspections of the equipment shall be undertaken by the service provider's senior personnel (minimum supervisor or field engineer level) or the service provider's Quality Assurance Inspectors.
- b) The details of the annual inspections, date of inspection and the condition of the equipment shall be recorded on a checklist signed and certified by the service provider's representative and a copy forwarded to CSIR Agents in order to monitor and close the quality inspection loop.
- c) Should any defects or remedial work be required in terms of the Annual Inspection, the service provider shall expeditiously undertake the corrective action work within a thirty (30) day period and shall forward to CSIR on completion a signed copy of the detailed items rectified.
- d) CSIR or its duly appointed Agents shall have the right to re-inspect and/or validate the acceptable completion of this corrective action.

3.8.6 Independent Inspections

- a) CSIR shall at any time have the right to authorise independent SANS 1545 compliance inspections of an individual component or the entire lift and escalator equipment installations using suitably qualified Registered Lift Inspectors. A copy of the results of such inspections shall be promptly communicated in writing to the service provider. Should any defects or remedial work be required in term of the Maintenance Agreement, the service provider shall expeditiously undertake within a mutually agreed time period (usually 30 days) to carry out the corrective work. When the service provider's work has been completed satisfactorily, CSIR or its duly appointed Agent(s) shall be notified in writing. In the opinion of CSIR, a further follow-up inspection by CSIR or its Agent(s) may be conducted.
- b) Should the follow-up inspection show that the work as agreed and undertaken by the service provider has not been carried out satisfactorily, CSIR or their Agent will

place the service provider in default and allow him a maximum fourteen (14) calendar days to rectify the situation. Should the service provider still be in default at the end of this period, CSIR shall have the right to summarily cancel the Maintenance Agreement and/or take such action as CSIR deems fit to rectify the situation to CSIR satisfaction.

- c) Notwithstanding CSIR rights in terms of the clause above, the service provider shall still be liable for the costs associated with the correction of the non-compliance which placed the service provider in default in the first place. He shall refund to CSIR these costs, failing which CSIR retains the right to subtract these costs from any fees due to the service provider.
- d) The Independent Inspections shall in no way limit the service provider's responsibility with respect to any obligation or liabilities in terms of The Maintenance Agreement or the Act.

Annexure C

Technical Evaluation Matrix/Rubrics

RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No. 3576/12/06/2023

Scoring sheet to be used to evaluate functionality.

Criteria	Proof required	Points allocation		Weight
1. Company experience	<ul style="list-style-type: none"> • The service provider must have a minimum of five (5) years' experience in passenger and goods lift maintenance services. • The bidder must provide a clearly detailed profile, which includes a value proposition, stipulating the number of years rendering similar services and reflecting the required scope of works (provision of passenger and goods lift maintenance services). • The profile must not be longer than 10 pages. 	No submission of company profile or less than 4 years company experience	0 points	20%
		5 to 6 years company experience	5 points	
		7 to 8 years company experience	7 points	
		> 9 years company experience	10 points	

<p>2. Client References (Only relevant references)</p>	<ul style="list-style-type: none"> A minimum of three (3) contactable references letters reflecting the required scope of works (passenger and goods lift maintenance services), for services rendered between 2015 and 2023. (Appointment letters, Purchase Orders, Contracts, Completion certificates, will not be considered). The references letter must have the following details: <ul style="list-style-type: none"> The reference letter must be in official company letterhead. The reference letter must indicate the description of the services and date of the service provided, and value of the transaction or contract. The reference letter must have email address and telephone number. The reference letter must be dated and signed. 	<table border="1"> <tr> <td>No submission of reference letters or less than 3 contactable reference letters</td> <td>0 points</td> </tr> <tr> <td>3 to 4 contactable reference letters</td> <td>5 points</td> </tr> <tr> <td>5 to 6 contactable reference letters</td> <td>7 points</td> </tr> <tr> <td>> 7 contactable reference letters</td> <td>10 points</td> </tr> </table>	No submission of reference letters or less than 3 contactable reference letters	0 points	3 to 4 contactable reference letters	5 points	5 to 6 contactable reference letters	7 points	> 7 contactable reference letters	10 points	<p>30%</p>
No submission of reference letters or less than 3 contactable reference letters	0 points										
3 to 4 contactable reference letters	5 points										
5 to 6 contactable reference letters	7 points										
> 7 contactable reference letters	10 points										
<p>3. CV of Field Engineer</p>	<ul style="list-style-type: none"> Detailed CV of qualified Engineer with a minimum of 5 years relevant experience in passenger and goods lift maintenance services. Must have a minimum qualification of Electrical or Mechanical Engineering National Diploma 	<table border="1"> <tr> <td>No submission of CV or with less 4 years' experience</td> <td>0 points</td> </tr> <tr> <td>5 – 6 years' experience</td> <td>5 points</td> </tr> <tr> <td>7– 9 years' experience</td> <td>7 points</td> </tr> <tr> <td>> 10 years' experience</td> <td>10 points</td> </tr> </table>	No submission of CV or with less 4 years' experience	0 points	5 – 6 years' experience	5 points	7– 9 years' experience	7 points	> 10 years' experience	10 points	<p>10%</p>
No submission of CV or with less 4 years' experience	0 points										
5 – 6 years' experience	5 points										
7– 9 years' experience	7 points										
> 10 years' experience	10 points										

<p>4. CV of Lift Mechanic</p>	<ul style="list-style-type: none"> Detailed CV of a qualified lift Mechanic with a minimum of 5 years relevant experience in passenger and goods lift maintenance services. Must have a Trade Test and NQF 5. 	<table border="1"> <tr> <td>No submission of CV or with less 4 years' experience</td> <td>0 points</td> </tr> <tr> <td>5 – 6 years' experience</td> <td>5 points</td> </tr> <tr> <td>7– 9 years' experience</td> <td>7 points</td> </tr> <tr> <td>> 10 years' experience</td> <td>10 points</td> </tr> </table>	No submission of CV or with less 4 years' experience	0 points	5 – 6 years' experience	5 points	7– 9 years' experience	7 points	> 10 years' experience	10 points	<p>10%</p>
No submission of CV or with less 4 years' experience	0 points										
5 – 6 years' experience	5 points										
7– 9 years' experience	7 points										
> 10 years' experience	10 points										
<p>5. Implementation / Methodology Approach</p>	<ul style="list-style-type: none"> Bidders must submit a proposed implementation methodology that is aligned to the scope of work, highlighting the risks and mitigation measures and qualify plan. Bidders must submit a proposed required solution. This must include actual process on how the passenger and goods lift maintenance services and equipment will be carried out. Bidders must include / list their company resources, safety plans etc. Bidders must include after-hours support and management of call outs. Bidders must include key aspects; methodology to conduct Annexure A & B in terms of OHS Act lift, escalator, and passenger conveyor regulations. Methodology to perform inspections on the following lift components: <ul style="list-style-type: none"> Main drive system parts Shaft structure Overload detection devices Landing & lift car doors and the interlocking systems Suspension chains and ropes Electrical devices (include earth bonding, earthing, safety devices, and a selection of fuses and more) 	<table border="1"> <tr> <td>No submission of Implementation Plan / Methodology and Approach or the Implementation Plan / Methodology Approach is submitted and omits key aspects.</td> <td>0 points</td> </tr> <tr> <td>The Implementation Plan / Methodology Approach is submitted and covers key aspects of the tender</td> <td>5 points</td> </tr> <tr> <td>The Methodology and approach plan is specifically tailored to suit the key aspects and will meet the CSIR needs. The bidder has indicated the resources plan or capacity to perform the services, including equipment and staff to carry out the contract.</td> <td>7 points</td> </tr> <tr> <td>The Methodology and approach plan is innovative, well-articulated and synchronise with the scope of work and deliverables. The bidder has clearly indicated the resources plan or capacity to perform the services, including vehicles, equipment, timelines, and staff to carry out the contract. The plan address how quality standard will be monitored, management of documents and records, how deficiencies will be corrected, or the bidder is ISO 9001 Certified.</td> <td>10 points</td> </tr> </table>	No submission of Implementation Plan / Methodology and Approach or the Implementation Plan / Methodology Approach is submitted and omits key aspects.	0 points	The Implementation Plan / Methodology Approach is submitted and covers key aspects of the tender	5 points	The Methodology and approach plan is specifically tailored to suit the key aspects and will meet the CSIR needs. The bidder has indicated the resources plan or capacity to perform the services, including equipment and staff to carry out the contract.	7 points	The Methodology and approach plan is innovative, well-articulated and synchronise with the scope of work and deliverables. The bidder has clearly indicated the resources plan or capacity to perform the services, including vehicles, equipment, timelines, and staff to carry out the contract. The plan address how quality standard will be monitored, management of documents and records, how deficiencies will be corrected, or the bidder is ISO 9001 Certified.	10 points	<p>30%</p>
No submission of Implementation Plan / Methodology and Approach or the Implementation Plan / Methodology Approach is submitted and omits key aspects.	0 points										
The Implementation Plan / Methodology Approach is submitted and covers key aspects of the tender	5 points										
The Methodology and approach plan is specifically tailored to suit the key aspects and will meet the CSIR needs. The bidder has indicated the resources plan or capacity to perform the services, including equipment and staff to carry out the contract.	7 points										
The Methodology and approach plan is innovative, well-articulated and synchronise with the scope of work and deliverables. The bidder has clearly indicated the resources plan or capacity to perform the services, including vehicles, equipment, timelines, and staff to carry out the contract. The plan address how quality standard will be monitored, management of documents and records, how deficiencies will be corrected, or the bidder is ISO 9001 Certified.	10 points										

	<ul style="list-style-type: none"> ○ Braking systems (includes overspeed devices and buffers) ○ Communication and alarms equipment ○ Lubrication and seamless functioning ○ Signs, locks & keys ○ Emergency communication and backup system 		
Total			100%

Annexure D

Pricing Schedule- Firm Prices

FRP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years to the CSIR

RFP No. 3576/12/06/2023

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

Make	Registration number	Year of Manufacture	Monthly Rate (Y1)	Year 1 (Monthly rate X 12 months)	Monthly Rate (Y2)	Year 2 (Monthly rate X 12 months)	Monthly Rate (Y3)	Year 3 (Monthly rate X 12 months)	Monthly Rate (Y4)	Year 4 (Monthly rate X 12 months)	Monthly Rate (Y5)	Year 5 (Monthly rate X 12 months)
Express (Otis)	PE3948	1973										
Otis	72NEO495	1972										
Sabiem	PE4329	1976										
Sabiem	PE4302	1977										
Sabiem	PE4579	1981										
Sabiem	PE4578	1981										
Thyssen	CTE 3185	1982										
Thyssen	PE5550	1988										
Thyssen	02/L5585	2010										
Thyssen	02/l1154	2010										
Vimec	124715	2007										
Total service per year (excluding VAT)												
Plus 15% VAT												
Total Cost per year (including VAT)												

Total contract value for 5 years, including VAT	R
--	----------

Annexure E

Proposal Form and List of Returnable Documents

RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No. 3576/12/06/2023

I/We _____

[name of entity, company, close corporation, or partnership] of [full address]

carrying on business trading/operating as

_____ represented by _____ in my capacity as

_____ being duly authorised thereto by a Resolution of the Board of Directors or Members or Certificate of Partners, dated _____ to enter into, sign execute and complete any documents relating to this proposal and any subsequent Agreement. The following list of persons are hereby authorised to negotiate on behalf of the abovementioned entity, should CSIR decide to enter into Post Tender Negotiations with shortlisted bidder(s).

FULL NAME(S) CAPACITY SIGNATURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

I/We hereby offer to supply the abovementioned Services at the prices quoted in the schedule of prices in accordance with the terms set forth in the documents listed in the accompanying schedule of RFP documents.

I/We agree to be bound by those conditions in CSIR's:

1. General RFP Terms and Conditions; and [CSIR's Purchasing Terms and Conditions](#) or Any other standard or special conditions mentioned and/or embodied in this Request for Proposal.

I/We accept that unless CSIR should otherwise decide and so inform me/us in the letter of award/intent, this Proposal [and, if any, its covering letter and any subsequent exchange of correspondence], together with CSIR's acceptance thereof shall constitute a binding contract between CSIR and me/us.

I/We further agree that if, after I/we have been notified of the acceptance of my/our Proposal, I/we fail to enter into a formal contract if called upon to do so, or fail to commence the supply of Services within 4 [four] weeks thereafter, CSIR may, without prejudice to any other legal remedy which it may have, recover from me/us any expense to which it may have been put in calling for Proposals afresh and/or having to accept any less favourable Proposal.

I/We accept that any contract resulting from this offer will be for a period as determined by the CSIR.

Furthermore, I/we agree to a penalty clause/s which will allow CSIR to invoke a penalty against us for non-compliance with material terms of this RFP including the delayed delivery of the Services due to non-performance by ourselves, failure to meet Subcontracting.

I/we agree that non-compliance with any of the material terms of this RFP, including those mentioned above, will constitute a material breach of contract and provide CSIR with cause for cancellation.

ADDRESS FOR NOTICES

The law of the Republic of South Africa shall govern any contract created by the acceptance of this RFP. The domicilium citandi et executandi shall be a place in the Republic of South Africa to be specified by the Respondent hereunder, at which all legal documents may be served on the Respondent who shall agree to submit to the jurisdiction of the courts of the Republic of South Africa. Foreign Respondents shall, therefore, state hereunder the name of their authorised representative in the Republic of South Africa who has the power of attorney to sign any contract which may have to be entered into in the event of their Proposal being accepted and to act on their behalf in all matters relating to such contract.

Respondent to indicate the details of its domicilium citandi et executandi hereunder:

Name of Entity:

Facsimile: _____

Address: _____

NOTIFICATION OF AWARD OF RFP

As soon as possible after approval to award the contract(s), the successful Respondent [**the Service provider**] will be informed of the acceptance of its Proposal. Unsuccessful Respondents may be advised in writing of the name of the successful Service provider and the reason as to why their Proposals have been unsuccessful, for example, in the category of price, delivery period, quality, B-BBEE or for any other reason.

VALIDITY PERIOD

CSIR requires a **validity period of 90** [Ninety calendar Days from closing date] against this RFP.

Bidders are to note that they may be requested to extend the validity period of their bid, at the same terms and conditions, if the internal evaluation process has not been finalised within the validity period. However, once the adjudication body has approved the process and award of the business to the successful bidder(s), the validity of the successful bidder(s)' bid will be deemed to remain valid until a final contract has been concluded.

NAME(S) AND ADDRESS / ADDRESSES OF DIRECTOR(S) OR MEMBER(S)

The Respondent must disclose hereunder the full name(s) and address(s) of the director(s) or members of the company or close corporation [**C.C.**] on whose behalf the RFP is submitted.

1. Registration number of company / C.C.

2. Registered name of company / C.C.

3. Full name(s) of director/member(s) Address/Addresses ID Number(s)

RETURNABLE DOCUMENTS

Returnable Documents means all the documents, Sections and Annexures, as listed in the tables below.

a) Mandatory Returnable Documents

Failure to provide any Mandatory Returnable Documents at the closing date and time of this bid will result in a Respondent's disqualification. Bidders are therefore urged to ensure that all these documents are returned with their Proposals.

Please confirm submission of the mandatory Returnable Documents detailed below by so indicating [**Yes** or **No**] in the table below:

ITEM NO.	MANDATORY RETURNABLE DOCUMENTS	SUBMITTED [Yes/No]
1	Proof of a Trade Test for Lift Mechanic	
2	Proof of qualification for a Lift Mechanic <ul style="list-style-type: none">A minimum qualification of NQF 5 is required	
3	Proof of qualification for the Field Engineer. <ul style="list-style-type: none">A minimum qualification in Electrical or Mechanical Engineering National Diploma is required.	
4	Proof of South African National Accreditation Systems (SANAS) for inspections of lifts, escalators and passenger conveyors, Type B.	
5	A valid letter of good standing relevant to the scope of work from the Department of Labour (COIDA) or any approved private insurance firm.	
6	Provide proof of valid public liability cover or letter of intent from an Insurance Firm of a minimum of Five Million (R 5 000 000.00). <ul style="list-style-type: none">The preferred bidder must have valid public liability cover prior to being awarded the contract.	

b) Essential Returnable Documents

In addition to the requirements of section (a) above, Respondents are further required to submit with their Proposals the following **essential Returnable Documents** as detailed below.

Essential Returnable Documents required for evaluation purposes:

Failure to provide any essential Returnable Documents used for purposes of scoring a bid, by the closing date and time of this bid will not result in a Respondent's disqualification. However, Bidders will receive an automatic score of zero for the applicable evaluation criterion. Bidders are therefore urged to ensure that all these documents are returned with their Proposals.

Please confirm submission of these essential Returnable Documents by so indicating [Yes or No] in the table below:

ITEM NO.	ESSENTIAL RETURNABLE DOCUMENTS USED FOR SCORING	SUBMITTED [Yes/No]
1	Annexure D: Pricing Schedule or Bill of Quantities	
2	<p>Annexure G: Preference Points Award Form in Terms of the Preferential Procurement Regulations 2022 (Mandatory documents to claim preference points)</p> <ul style="list-style-type: none"> • Valid copy of BBEE certificate/ sworn affidavit <ul style="list-style-type: none"> ✓ In case of unincorporated trust, consortium or joint venture, they must submit their consolidated B-BBEE scorecard with their <u>individual B-BBEE Certificate or Sworn Affidavit.</u> ✓ In case of sub-contracting both parties must submit copies of their valid BBEE certificates. <p>NB: Non-submission or invalid submission will result in zero points. Should the individual entity's B-BBEE Certificate or Sworn Affidavit of the unincorporated trust, consortium or joint venture parties <u>be invalid</u>, the joint venture scorecard will also be invalid.</p>	
3	ISO 9001 Certification.	

Other Essential Returnable Documents:

Failure to provide other essential Returnable Documents may result in a Respondent's disqualification. Bidders are therefore urged to ensure that all these documents are returned with their Proposals.

Please confirm submission of these essential Returnable Documents by indicating Yes or No in the table below

<u>ITEM NO.</u>	<u>OTHER ESSENTIAL RETURNABLE DOCUMENTS</u>	<u>SUBMITTED [Yes/No]</u>
1	Annexure A: Standard Bidding Document (SBD) 1 Form	
2	Annexure E: Proposal Form and List of Returnable documents (<i><u>This document</u></i>)	
3	Annexure F: Certificate of Acquaintance with RFP, Terms & Conditions & Applicable Documents	
4	Annexure H: Standard Bidding Document (SBD) 4 Form	
5	Annexure I: RFP Declaration and Breach of Law Form	

CONTINUED VALIDITY OF RETURNABLE DOCUMENTS

The successful Respondent will be required to ensure the validity of all returnable documents, including but not limited to its Tax Clearance Certificate and valid B-BBEE Verification Certificate, for the duration of any contract emanating from this RFP. Should the Respondent be awarded the contract [**the Agreement**] and fail to present CSIR with such renewals as and when they become due, CSIR shall be entitled, in addition to any other rights and remedies that it may have in terms of the eventual Agreement, to terminate such Agreement forthwith without any liability and without prejudice to any claims which CSIR may have for damages against the Respondent.

SIGNED at _____ on this ____ day of _____ 20_____

SIGNATURE OF WITNESSES AND NAME of WITNESSES

1 _____

Name _____

2 _____

Name _____

SIGNATURE OF RESPONDENT'S AUTHORISED REPRESENTATIVE:

Name: _____

Designation: _____

Annexure F

Certificate of Acquaintance with RFP, Terms & Conditions & Applicable Documents

RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No. 3576/12/06/2023

By signing this certificate, the Respondent is deemed to acknowledge that he/she has made himself/herself thoroughly familiar with and agrees with all the conditions governing this RFP. This includes those terms and conditions contained in any printed form stated to form part hereof, including but not limited to the documents stated below. As such, CSIR will recognise no claim for relief based on an allegation that the Respondent overlooked any such condition or failed properly to take it into account for the purpose of calculating tendered prices or any other purpose:

Should the Bidder find any terms or conditions stipulated in any of the relevant documents quoted in the RFP unacceptable, it should indicate which conditions are unacceptable and offer alternatives by written submission on its company letterhead, attached to its submitted Bid. Any such submission shall be subject to review by CSIR’s Legal Counsel who shall determine whether the proposed alternative(s) are acceptable or otherwise, as the case may be. A material deviation from any term or condition may result in disqualification.

Bidders accept that an obligation rests on them to clarify any uncertainties regarding any bid which they intend to respond on, before submitting the bid. The Bidder agrees that he/she will have no claim based on an allegation that any aspect of this RFP was unclear but in respect of which he/she failed to obtain clarity.

The bidder understands that his/her Bid will be disqualified if the Certificate of Acquaintance with RFP documents included in the RFP as a returnable document, is found not to be true and complete in every respect.

SIGNED at _____ on this _____ day of _____ 20_____

SIGNATURE OF WITNESSES AND NAME OF WITNESSES

1 _____

Name _____

2 _____

Name _____

SIGNATURE OF RESPONDENT’S AUTHORISED REPRESENTATIVE:

Name: _____

Designation: _____

Annexure G

Preference Points Award Form in Terms of the Preferential Procurement Regulations 2022

RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No. 3576/12/06/2023

This preference form must form part of all bids invited. It contains general information and serves as a claim form for the preference points allocated on the basis of specific goals outlined in point 3 below.

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF SPECIFIC GOALS, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to this bid:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).
- 1.2 Points for this bid shall be awarded for:
- (a) Price; and
 - (b) Preference Points based on specific goals.
- 1.3 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
Preference Points	20
Total points for Price and Preference Points must not exceed	100

- 1.4 Failure on the part of a bidder to submit proof of preference points together with the bid, will be interpreted to mean that preference points are not claimed.
- 1.5 The CSIR reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the CSIR.

2. POINTS AWARDED FOR PRICE

2.1 THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

80/20

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

3. PREFERENCE POINTS AWARDED

3.1 In terms of Regulation 4 (2) and 4 (2) of the Preferential Procurement Regulations, preference points may be awarded to a bidder for the specific goal specified for the tender in accordance with the table below:

3.2 Specific goals must be determined per tender.

Specific Goals	Preference Points
Black Ownership	10
Reconstruction and Development Programme (RDP) Goals ¹	10
- Qualifying Small Enterprise	
Total	20

3.3 Total preference points per specific goal to be determined per tender.

3.3.1. Total preference points per specific goal to be awarded as follows:

3.3.1.1. Preferential points for black ownership will be awarded as follows:

Black Ownership	% of Preferential points
Bidder with 100% black ownership	100%
Bidder with 51% to 99% black ownership	50%

¹ RDP Goals: a. The promotion of South African owned enterprises; b. The promotion of export orientated production to create jobs, c. The promotion of SMMEs; d. The creation of new jobs or the intensification of labour absorption; e. The promotion of enterprises located in a specific province for work to be done or services to be rendered in that province; f. The promotion of enterprises located in a specific region for work to be done or services to be rendered in that region; g. The promotion of enterprises located in a specific municipal area for work to be done or services to be rendered, h. The promotion of enterprises located in rural areas, i. The empowerment of the work force by standardising the level of skill and knowledge of workers; j. The development of human resources, including by assisting in tertiary and other advanced training programmes, in line with key indicators such as percentage of wage bill spent on education and training and improvement of management skills; and k. The upliftment of communities through, but not limited to, housing, transport, schools, infrastructure donations, and charity organizations.

Bidder with less than 51% black ownership	0%
---	----

3.3.1.2. Preferential points for RPD Goals will be awarded as follows:

RDP Goals - Qualifying Small Enterprise	% of Preferential points
RDP Goals met	100%
RDP Goals not met	0%

3.4. Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture² will qualify for preference points as a legal entity (Incorporated), provided that the entity submits its valid B-BBEE certificate. Only valid BBEE certificates issued by SANAS accredited verification agency will be considered for allocation of points.

A trust, consortium or joint venture will qualify for preference points as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid. Only valid consolidated BBEE certificates issued by SANAS accredited verification agency will be considered for allocation of points.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. The CSIR will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement. Furthermore, in bids where unincorporated joint venture and/or consortium/sub-contractors are involved, each party must submit a separate TCS PIN and CSD number.

The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

3.5. Sub-contracting

A bidder must not be awarded preference points if it is indicated in the tender documents that such a bidder intends sub- contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

A bidder awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the bidder concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

4. BID DECLARATION

4.1 Bidders who claim points in respect of specific goals **must** submit the following documents:

Mandatory documents to claim preference points	Submitted	
	Yes	No
Valid copy of BBBEE certificate/ sworn affidavit to claim Black Ownership, and RDP (QSEs) preference points ³	√	√

DECLARATION WITH REGARD TO COMPANY/FIRM

Name of company/firm:.....

VAT registration number:.....

Company registration number:.....

I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the documents submitted to claim preference points based on the specific goals are valid, and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 3 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 3, the contractor may be required to furnish further documentary proof to the satisfaction of the CSIR that the awarded are correct;
- iv) If any document is obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the CSIR may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution.

³ In case of unincorporated trust, consortium or joint venture, they must submit their consolidated B-BBEE scorecard with submitting their **individual B-BBEE Certificate or Sworn Affidavit**, and each party must submit a separate TCS PIN and CSD number.
In case of sub-contracting both parties must submit copies of their valid BBBEE certificates

- v) If the CSIR is of the view that a bidder submitted false information regarding a specific goal, it must—
 - (a) inform the bidder; accordingly, and
 - (b) give the bidder an opportunity to make representations within 14 days as to why the tender may not be disqualified or, if the tender has already been awarded to the bidder, the contract should not be terminated in whole or in part.
- vi) After considering the representations referred to in subregulation (v)(b), the CSIR may, if it concludes that such information is false—
 - (a) disqualify the bidder or terminate the contract in whole or in part; and
 - (b) if applicable, claim damages from the bidder.

WITNESSES

1.

2.

.....
SIGNATURE(S) OF BIDDERS(S)

DATE:

ADDRESS.....

**Annexure H
Standard Bidding Document (SBD) 4**

RFQ No. 3576/12/06/2023

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest⁴ in the enterprise, employed by the state? **YES** **/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES** **/NO**

⁴ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? YES /NO

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name).....in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read, and I understand the contents of this disclosure.
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium⁵ will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be

⁵ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

Annexure I

DECLARATION BY BIDDER AND BREACH OF LAW FORM

RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No. 3576/12/06/2023

NAME OF ENTITY:

We _____ do hereby certify that:

1. CSIR has supplied and we have received appropriate responses to any/all questions [as applicable] which were submitted by ourselves for RFP Clarification purposes;
2. we have received all information we deemed necessary for the completion of this Request for Proposal [RFP].
3. we have been provided with sufficient access to the existing CSIR facilities/sites and any and all relevant information relevant to the Services as well as CSIR information and Employees and has had sufficient time in which to conduct and perform a thorough due diligence of CSIR's operations and business requirements and assets used by CSIR. CSIR will therefore not consider or permit any pre- or post-contract verification or any related adjustment to pricing, service levels or any other provisions/conditions based on any incorrect assumptions made by the Respondent in arriving at his Bid Price.
4. at no stage have we received additional information relating to the subject matter of this RFP from CSIR sources, other than information formally received from the designated CSIR contact(s) as nominated in the RFP documents.
5. we are satisfied, insofar as our entity is concerned, that the processes and procedures adopted by CSIR in issuing this RFP and the requirements requested from Bidders in responding to this RFP have been conducted in a fair and transparent manner; and
6. furthermore, we declare that a family, business and/or social relationship **exists / does not exist** [delete as applicable] between an owner / member / director / partner / shareholder of our entity and an employee or board member of the CSIR Group including any person who may be involved in the evaluation and/or adjudication of this Bid.
7. In addition, we declare that an owner / member / director / partner / shareholder of our entity **is / is not** [delete as applicable] an employee or board member of the CSIR.
8. If such a relationship as indicated in paragraph 6 exists, the Respondent is to complete the following section:

FULL NAME OF OWNER/MEMBER/DIRECTOR/
PARTNER/SHAREHOLDER: ADDRESS:

Indicate nature of relationship with CSIR:

[Failure to furnish complete and accurate information in this regard will lead to the disqualification of a response and may preclude a Respondent from doing future business with CSIR]

9. We declare, to the extent that we are aware or become aware of any relationship between ourselves and CSIR [other than any existing and appropriate business relationship with CSIR] which could unfairly advantage our entity in the forthcoming adjudication process, we shall notify CSIR immediately in writing of such circumstances.
10. We accept that any dispute pertaining to this Bid will be resolved through the Ombudsman process and will be subject to the Terms of Reference of the Ombudsman. The Ombudsman process must first be exhausted before judicial review of a decision is sought.
11. We further accept that CSIR reserves the right to reverse an award of business or decision based on the recommendations of the Ombudsman without having to follow a formal court process to have such award or decision set aside.

BREACH OF LAW

12. We further hereby certify that I/we (the bidding entity and/or any of its directors, members or partners) have/have not been [delete as applicable] found guilty during the preceding 5 [five] years of a serious breach of law, including but not limited to a breach of the Competition Act, 89 of 1998, by a court of law, tribunal or other administrative body. The type of breach that the Respondent is required to disclose excludes relatively minor offences or misdemeanours, e.g., traffic offences. This includes the imposition of an administrative fine or penalty.

Where found guilty of such a serious breach, please disclose:

NATURE OF BREACH:

DATE OF BREACH: _____

Furthermore, I/we acknowledge that CSIR reserves the right to exclude any Respondent from the bidding process, should that person or entity have been found guilty of a serious breach of law, tribunal or regulatory obligation.

SIGNED at _____ on this _____ day of _____ 20____

For and on behalf of _____ duly authorised hereto	AS WITNESS:
Name:	Name:
Position:	Position:
Signature:	Signature:
Date	Registration No of Company/CC
Place	Registration Name of Company/CC

ANNEXURE J

Draft Service Level Agreement



RFP for the provision of passenger and goods lift maintenance services to the CSIR for a period of 5 years

RFP No.: 3576/12/06/2023

SERVICE LEVEL INDICATORS

SERVICE LEVEL INDICATORS

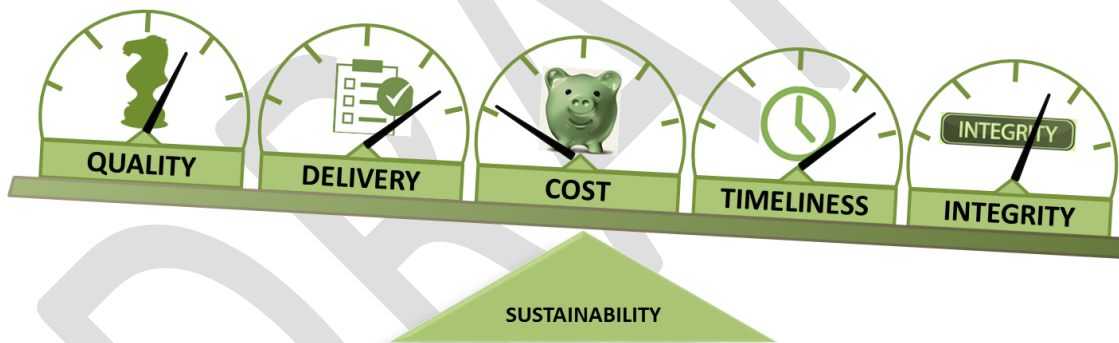
1. INTRODUCTION

The purpose of the Service Level Indicators is to guide and document the expectations and requirements of the services to be rendered to the Tendering Institutions by the Service Provider.

This document may be used as the benchmark against which reviews and, as appropriate, modifications to the service provided by the Service Provider shall take place.

2. KEY PERFORMANCE INDICATORS

Key performance indicators (KPIs) are management tools designed to monitor supplier performance and help meet the goals, objectives and service levels of the contract.



3. RANGE OF SERVICES

The Services rendered are reflected in the Scope of Work (**Annexure B**: Technical Specification).

4. MEASUREMENT CRITERIA

The following table lists a comprehensive number of Key Performance Areas and Indicators:

Key Service Area	Description of Service	Target	Frequency of Measurement	Weighting of Service	Comments
Performance levels	Call-back rate	Less than 6 call back per unit per annum	Annually	6 call backs	
Performance levels	Down time	Maximum equipment operation	Monthly	Less than 4 hours	
Call out response times	Availability of technicians	24 hours	Daily (life of contract)	Response within the contractual time limits per contract	
Call out response times	Passenger entrapments (occupied stop)	30 minutes – Normal working hours 45 minutes – Outside normal working hours	Daily (life of contract)	Response within the contractual time limits per contract	
Call out response times	Lift out of service (unoccupied stop)	60 minutes - Normal working hours 90 minutes - Outside normal working hours	Daily (life of contract)	Response within the contractual time limits per contract	
Comprehensive B reports	Produce comprehensive B reports within 60 days of accepting the contract	9 comprehensive B reports	Once at beginning of contract	9 comprehensive B reports in the machine room	
Comprehensive B reports	Produce comprehensive B reports every 2 years there after	9 comprehensive B reports	2 yearly	9 comprehensive B reports in the machine room	
Preventative maintenance	Monthly service	Perform monthly service on all lifts in the contract	Monthly	9 monthly service reports submitted to maintenance department	
Preventative maintenance	Six monthly service	Thoroughly test buffers electrical safety contacts, safety gear electrical contacts, governor electrical contacts, emergency stop switches and all escalator electrical safety contacts.	6 monthly	Recorded on the escalator service book.	

Key Service Area	Description of Service	Target	Frequency of Measurement	Weighting of Service	Comments
Preventative maintenance	Six monthly service	Thoroughly inspect and report the main hoisting ropes, including selector, governor and compensating ropes as required by the Act.	6 monthly	Recorded on the escalator service book.	
Preventative maintenance	12 monthly service	Thoroughly test and log the car and counterweight safety gear, over-speed governors, ultimate limits, main breaks, and buffer.	12 monthly	Recorded on the escalator service book.	
Preventative maintenance	12 monthly service	Thoroughly activate the lift break-glass unit of fire signal, the lift emergency fire control operation. Record results on the CSIR site maintenance register. CSIR technical staff shall be informed 30 days before this activity takes place.	12 monthly	Record on CSIR site maintenance register.	
Preventative maintenance	12 monthly service	Thoroughly test by simulation the lift emergency stand-by power control operation. Results and date of the test shall be recorded on the CSIR site maintenance register	12 monthly	Record on CSIR site maintenance register.	
Preventative maintenance	Components forming part of the contract at no additional cost to CSIR	Replacing lift car light lamps or fluorescent tubes, and all signal lamps.	As and when required	No audit finding	
		Lift shaft lighting – lamps or fluorescent tubes	As and when required	No audit finding	
		Lift motor room lamps or fluorescent tubes	As and when required	No audit finding	
		Testing of the lift intercom system	Monthly	No audit finding	