

Request for Proposals (RFP)

The provision of services to develop, update and expand Business Plan training material, also review and expand guidelines on Sustainable Finance Options Available to South African Businesses on behalf of the CSIR.

RFP No. 1064/30/01/2023

Date of Issue	Thursday, 15 December 2022	
Compulsory Briefing and Site Inspection	None	
Closing Date	Monday, 30 January 2023 at 16h30	
Enquiries and submission of proposals	Strategic Procurement Unit	E-mail: tender@csir.co.za
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

TABLE OF CONTENTS

SECTION A – TECHNICAL INFORMATION	4
1. INTRODUCTION	4
2. BACKGROUND	4
3. INVITATION FOR PROPOSAL	4
4. PROPOSAL SPECIFICATION	5
5. PROJECT SCOPE	5
6. PROJECT DELIVERABLES	6
7. FUNCTIONAL EVALUATION CRITERIA	8
8. ELIMINATION CRITERIA	9
9. NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION	9
SECTION B – TERMS AND CONDITIONS	11
1. PROCEDURE FOR SUBMISSION OF PROPOSALS	11
2. TENDER PROGRAMME	11
3. SUBMISSION OF PROPOSALS	11
4. DEADLINE FOR SUBMISSION	12
5. AWARDING OF TENDERS	12
6. EVALUATION PROCESS	12
7. REQUIREMENTS FOR A VALID BROAD-BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE) CERTIFICATE, CIPC CERTIFICATE AND SWORN AFFIDAVIT	13
8. PRICING PROPOSAL	15
9. VALIDITY PERIOD OF PROPOSAL	15
10. APPOINTMENT OF SERVICE PROVIDER	15
11. ENQUIRIES AND CONTACT WITH THE CSIR	15
12. MEDIUM OF COMMUNICATION	16
13. COST OF PROPOSAL	16
14. CORRECTNESS OF RESPONSES	16
15. ENGAGEMENT OF CONSULTANTS	16
16. TRAVEL EXPENSES	16
17. VERIFICATION OF DOCUMENTS	17
18. SUB-CONTRACTING	17
19. ADDITIONAL TERMS AND CONDITIONS	17
20. PERSONAL INFORMATION	18
21. CSIR RESERVES THE RIGHT TO	19

22. DISCLAIMER	19
DECLARATION BY TENDERER	20
ANNEXURE A	21

SECTION A – TECHNICAL INFORMATION

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, 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. BACKGROUND

The NCPC-SA in collaboration with Ernst and Young (EY) implemented the “RECP Finance” project in 2017 and 2018. The main aim of the project was to assess and promote financing instruments for mainstreaming Resource Efficient and Cleaner Production (RECP) into enterprise finance. The main outcomes of the project were:

- To support SMEs (capacity building) to access the existing green finance mechanisms
- To provide services such as the facilitation of dialogues between companies and banks, including awareness raising
- Convincing SMEs of the relevance of investments (Payback period) as well as the socio-economic benefits of projects
- Developing success stories (case studies)
- Development of training material (Business plan development)
- Development of databases of:
 - Available financial mechanisms
 - Projects that successfully accessed financing for implementation

Material was developed as a generic overview of how to develop a business plan. The material contains about 57 slides which takes around two hours to deliver.

The NCPC-SA has identified access to and knowledge of available financing as one of the barriers to implementation of RECP projects.

3. INVITATION FOR PROPOSAL

Proposals are hereby invited for the supply of services to develop, update, and expand Business Plan training material as well as the Green Finance Options Available to South African Business Guideline.

4. PROPOSAL SPECIFICATION

All proposals are to be submitted in a format specified in this enquiry. However, tenderers are welcome to submit additional (optional) elements in their proposals over and above the originally specified tasks.

5. PROJECT SCOPE

Detailed tasks of the project is provided section 6. In broad terms the scope of the project involves the following:

1. Update and expand on Business Plan development training material
2. Deliver the first three End User courses in a face to face and online format (to be determined at the time and dependent on the COVID situation)
3. Update of the existing databases of available funding mechanisms in South Africa
4. Review available tools and development of a simple Microsoft Excel - based Business plan development tool. This tool will aid in the training and will be used to develop business plans that would be acceptable for submission to financial institutions for funding purposes
5. Delivery of "Train the trainer" event
6. Review, update and expand on GREEN FINANCE OPTIONS AVAILABLE TO SOUTH AFRICAN BUSINESS GUIDELINE

6. PROJECT DELIVERABLES

Task 1: Update and Expand Business Plan development training material

Business Plan development material was developed by Ernst and Young during the RECP finance project in 2017. The material contains 57 slides and has the following main heading structure:

1. Project description
2. Management team
3. Budget and schedule
4. Financial analysis
5. Financial plan
6. Risk management strategy
7. Financial institution role
8. Context overview & analysis
9. Non-financial assessment

This structure can be expanded upon, firstly to include an overview of the available funding, not only for Energy related project but to add more information on other RECP projects such as water and materials projects. A two- day End User course is envisioned (face to face delivery) or a four – half day online course. The course should be structures such that either of these would be possible.

More detail is expected in each section with practical examples of requirements of the different funding institutions.

Regular exercises that candidates can conduct either online or in class must be included in the material. The best way of including exercises it to start from a write-up of a case study, which must be included in the material.

The course must be followed by three (1-hour) exams. This will allow for three opportunities to write the exam with different questions on each paper. The exams will be open-book exams and the paper should therefore include mostly calculations as well as insight questions with very few questions that can be answered from the book or an internet search.

Two short quizzes (10 multiple choice questions) should be included at the end of each day of tuition (physical 2-day course) on the material covered thus far.

A curriculum document needs to be developed, the template of which will be supplied. The curriculum document is a summary of the topics covered during the course, the means of evaluation, time spent and number of slides in each section.

A business plan template document needs to be developed with the framework of all the sections that need to be covered in a business plan submission and short descriptions in each section of what is required.

A Microsoft Excel Tool for development of a Business plan needs to be developed and integrated into the training material as well as used within exercises etc. The development of the tool is further discussed in Task 4.

Task 2: Delivery of first Three End User courses

This task includes the delivery of the first three instances of the course. These may be either online or face to face courses. The NCPC-SA will determine the format once the demand is established.

The NCPC-SA will be responsible for the arrangement of the three workshops while the supplier will be responsible for facilitation during the workshop. These workshops will cater for up to 25 candidates per workshop.

Task 3: Updating of databases

Two databases were developed in 2017. These databases were aimed at listing the funding mechanism available to South African SMEs. Even though a few South African funding mechanisms are listed, more detail is required, and the information needs to be updated. The internationally available funding should also be updated and expanded.

The databases need to be expanded to include funding available for all “Green” projects in addition to energy projects. This would include any water, effluent and materials and waste projects funding available.

Task 4: Review of available tools and development of an Excel-based tool

An Excel tool was developed in 2017 which contained the framework of chapters to be included in a business plan. This tool must be reviewed and updated with reference to similar work performed by the Eco-Industrial Park project by the NCPC-SA, GIZ, National Business Initiative (NBI) as well as the Green Cape.

The tool must be the basis from which the development of a business plan can be conducted. It needs to cover all the aspects and calculations that could typically include (but not be limited to):

- Compound interest calculations with deposit and monthly installments
- Nett Present Value (NPV)
- Life Cycle costing
- Financial metrics required by financial institutions which could include but not limited to:
 - Return on equity

- Annual debt service coverage ratio
- Project life coverage ratio
- Structuring of finance from different institutions

Task 5: Updating Guideline

Conduct a technical review on a GREEN FINANCE OPTIONS AVAILABLE TO SOUTH AFRICAN BUSINESS GUIDELINE

- Update guideline content
- Incentives validation against dtic incentives and other grants schemes
- Supply relevant criteria to access incentives
- Update and aligned guideline to be relevant to current development under the pandemic
- Update annexures i.e., bankable projects database, financial institutions database, case studies database and other financial programmes and tax incentives i.e., 12L calculations etc
- Expand on additional credit lines available to South African businesses

Task 6: Train the Trainer

Shortly after the delivery of the first three End User courses the Train the Trainer workshop (one workshop) should be held. The service provider will identify a pool of potential future trainers from the delegates that attended the courses, and these delegates will be invited to attend the Train the Trainer workshop.

During the workshop the service provider will be required to discuss the material with the potential trainers and assist them with any questions or “difficult to present” sections. The potential trainers should also be afforded the opportunity to present parts of the material. The presentations should then be evaluated, and potential candidates mentored to deliver the material proficiently.

Final feedback regarding the candidate’s proficiency should be communicated to the NCPD-SA and the candidates through a trainer evaluation report.

7. FUNCTIONAL EVALUATION CRITERIA

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

	Criteria	Weighting (100%)
1	Company experience	35%
2	Qualifications and skills	25%
3	Approach and methodology	20%
4	Project planning detail	15%
5	Additional value add elements/ideas	5%

7.1 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **70 %** will be eliminated from further evaluation.

7.2 Refer to Annexure A for the scoring sheet that will be used to evaluate functionality.

8. ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Late submission of Bids;
- Submission at the incorrect email address- submissions must be made to tender@csir.co.za
- Non-submission of a duly completed and signed Invitation to Bid Form (SBD 1).
- Non-submission of a duly completed and signed Bidder's Disclosure Form (SBD 4).
- Non-submission of a duly completed and signed Tenderer's Declaration of Interest Form.
- Bidders that are listed on the National Treasury (NT) database of restricted suppliers will not be considered.
- Bidders that are registered on the NT Register of Tender Defaulters will not be considered.

9. NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

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; and

- provide a valid copy of B-BBEE certificate issued by an accredited verification agency and bearing a SANAS logo; or
 - Valid sworn affidavits made on DTIC designed templates; or
 - DTIC issued affidavit; or
 - CIPC issued B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process. (RSA suppliers only)

SECTION B – TERMS AND CONDITIONS

1. PROCEDURE FOR SUBMISSION OF PROPOSALS

- 1.1 All proposals must be submitted electronically to tender@csir.co.za.
- 1.2 Respondents must use the RFP number as the subject reference number when submitting their bids.
- 1.3 The e-mail and file sizes should not exceed a total of 25MB per e-mail.
- 1.4 The naming/labeling syntax of files or documents must be short and simple (e.g., Product Catalogues).
- 1.5 All documents submitted electronically via e-mail must be clear and visible.
- 1.6 All proposals, documents, and late submissions after the due date will not be evaluated.
- 1.7 Documents submitted via cloud (i.e dropbox, WeTransfer, Google Drive) will not be considered.

NB: NO HARD COPIES OR PHYSICAL SUBMISSIONS WILL BE ACCEPTED

2. TENDER PROGRAMME

The tender program, as currently envisaged, incorporates the following key dates:

- Issue of tender documents: 15 December 2022
- Last date for submission of queries: 24 January 2023
- Closing / submission Date: 30 January 2023
- Estimated contract duration (in months/years) 10 months

3. SUBMISSION OF PROPOSALS

- 3.1 All proposals are to be submitted electronically to tender@csir.co.za. No late proposals will be accepted.
- 3.2 Responses submitted by companies must be signed by a person or persons duly authorised.
- 3.3 All e-mailed proposal submissions are to be clearly subject referenced with the RFP number. Proposals must consist of two parts, each of which must be sent in two separate e-mails with the following subject:

PART 1: Technical Proposal RFP No.: 0000/30/01/2023

PART 2: Pricing Proposal RFP No.: 0000/30/01/2023

- 3.4 The CSIR will award the contract to qualified tenderer(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price, and B-BBEE.
- 3.5 Proposals submitted must be in the following file formats:
- PDF.

4. DEADLINE FOR SUBMISSION

Proposals shall be submitted at the e-mail address mentioned above no later than the closing date of **Monday, 30 January 2023**, during CSIR's business hours. The CSIR business hours are between 08h00 and 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated e-mail address, it will be regarded as a late submission. Late submissions will not be considered.

5. AWARDING OF TENDERS

- 5.1 Awarding of tenders will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

6. EVALUATION PROCESS

6.1 Evaluation of proposals

An evaluation team will evaluate all proposals for functionality, price, and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderer/s.

A two-phase evaluation process will be followed:

- 6.1.1 The first phase includes the evaluation of elimination and functionality criteria.
- 6.1.2 The second phase includes the evaluation of price and B-BBEE status.

Pricing Proposals will only be considered after the functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

6.2 Preference points system

The 80/20 preference point system will be used where 80 points will be dedicated to pricing and 20 points to B-BBEE status. If all tenders received are more than R50m, the proposal will be cancelled and re-issued.

7. REQUIREMENTS FOR A VALID BROAD-BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE) CERTIFICATE, CIPC CERTIFICATE AND SWORN AFFIDAVIT

7.1 Only those tenderers who submit a valid SANAS accredited B-BBEE certificate or Sworn Affidavit (dtic or CIPC) will be awarded points for B-BBEE during evaluation.

7.2 The following constitutes a valid **B-BBEE certificate**:

- Name of enterprise as per enterprise registration documents issued by CIPC, and enterprise business address;
- Value-Add Tax number, where applicable;
- The B-BBEE Scorecard against which the certificate is issued, indicating all elements and scores achieved for each element. The actual score achieved must be linked to the total points as per the relevant Codes;
- B-BBEE status with corresponding procurement recognition level.
- The relevant Codes used to issue the B-BBEE Verification Certificate.
- Date of issue and expiry (e.g. 9 June 2018 to 8 June 2019). Where a measured entity was subjected to a re-verification process, due to material change, the B-BBEE Verification Certificate must reflect the initial date of issue, date of re-issue and the initial date of expiry. Re-verification does not extend the lifespan of the B-BBEE Verification Certificate
- Financial period which was used to issue the B-BBEE Verification Certificate.
- Unique identification number of the B-BBEE verification professional or agency (e.g., BVA...).
- Name and logo/mark of the B-BBEE verification professional or agency.
- A B-BBEE Verification Certificate must be signed by the technical signatory at the bottom with full name and surname. The details of the technical signatory can be checked from the SANAS website (www.sanas.co.za). No other person is allowed to sign the B-BBEE Verification Certificate apart from the technical signatory.
- The SANAS logo on the B-BBEE Verification Certificate.

7.3 The following constitutes a valid **dtic Sworn Affidavit:**

- Name/s of deponent as they appear in the identity document and the identity number.
- Designation of the deponent as either the director, owner or member must be indicated in order to know that person is duly authorised to depose of an affidavit.
- Name of enterprise as per enterprise registration documents issued by the CIPC, where applicable, and enterprise business address.
- Percentage of black ownership, black female ownership and designated group. In the case of specialised enterprises as per Statement 004, the percentage of black beneficiaries must be reflected.
- Indicate total revenue for the year under review and whether it is based on audited financial statements or management account.
- Financial year end as per the enterprise's registration documents, which was used to determine the total revenue.
- B-BBEE Status level. An enterprise can only have one status level.
- Empowering supplier status must be indicated. For QSEs, the deponent must select the basis for the empowering supplier status.
- Date deponent signed and date of Commissioner of Oath must be the same.
- Commissioner of Oath cannot be an employee or ex officio of the enterprise because, a person cannot by law, commission a sworn affidavit in which they have an interest.

7.4 The following constitutes a valid **CIPC B-BBEE certificate:**

- Name of enterprise, registration number and business address.
- Date of issue and expiry adding to twelve months (e.g., 9 June 2018 to 8 June 2019) must be indicated.
- Percentage of total black ownership, black female ownership and total white ownership.
- Certificate number.
- Barcode with tracking number
- Barcode with enterprise number.
- B-BBEE Status and procurement recognition level.
- The dtic logo on the top left corner, and CIPC logo on the top right corner.
- CIPC watermark

8. PRICING PROPOSAL

- 8.1 Pricing proposal must be cross-referenced to the sections in the Technical Proposal. Any options offered must be clearly labelled. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.
- 8.2 Price needs to be provided in South African Rand (excl. VAT).
- 8.3 Only firm prices* will be accepted during the tender validity period. Non-firm prices** (including prices subject to rates of exchange variations) will not be considered.
- 8.4 Payment will be according to the CSIR Payment Terms and Conditions.

9. VALIDITY PERIOD OF PROPOSAL

Each **proposal** shall be valid for a minimum period of hundred and twenty (120) calendar days calculated from the closing date.

10. APPOINTMENT OF SERVICE PROVIDER

- 10.1 The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 10.2 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.
- 10.3 Awarding of contracts will be announced on the National Treasury website, and no regret letters will be sent to unsuccessful bidders.

11. ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFP shall be submitted in writing to CSIR at tender@csir.co.za with **RFP No: 1064/30/01/2023 – “The provision of services to develop, update and expand Business Plan training material, also review and expand guidelines on Sustainable Finance Options Available to South African Businesses on behalf of the CSIR”** subject.

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.

12. MEDIUM OF COMMUNICATION

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

13. COST OF PROPOSAL

Tenderers are expected to fully acquaint themselves with the conditions, requirements, and specifications of this RFP before submitting proposals. Each bidder assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The CSIR is not responsible directly or indirectly for any costs incurred by tenderers.

14. CORRECTNESS OF RESPONSES

14.1 The tenderer 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.

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

15. ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

- Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or
- Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or
- Prescribed by the body - regulating the profession of the consultant.

16. TRAVEL EXPENSES

All travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imburements, must be in line with the CSIR's travel policy. The following will apply:

- i. Only economy class tickets will be used.
- ii. A maximum of R1400 per night for accommodation, dinner, breakfast and parking will be allowed.
- iii. No car rentals of more than a Group B will be accommodated.

17. VERIFICATION OF DOCUMENTS

17.1 Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. The CSIR will accept no liability concerning anything arising from the fact that pages are missing or duplicated.

17.2 Only one electronic copy of the proposal (Technical and Financial) must be submitted via e-mail to tender@csir.co.za. If the bidder sends more than one proposal, the first submission shall take precedence should it not have been recalled/withdrawn in writing by the bidder.

17.3 Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate e-mail and no such information should be available in the technical proposal.

18. SUB-CONTRACTING

18.1 A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer 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 tenderer qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.

18.2 A tenderer 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 person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.

19. ADDITIONAL TERMS AND CONDITIONS

19.1 A tenderer 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.

- 19.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 19.3 In case of proposal from a joint venture, the following must be submitted together with the proposal:
- Joint venture Agreement including split of work signed by both parties.
 - The original or certified copy of the B-BBEE certificate of the joint venture.
- 19.4 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.
- 19.5 Failure to comply with any of the terms and conditions as set out in this document will invalidate the proposal.

20. PERSONAL INFORMATION

- 20.1 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 Client further agrees to comply with all CSIR’s reasonable internal governance requirements pertaining to data protection.
- 20.2 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).
- 20.3 The Client consents to the transfer of such information to CSIR’s business contacts outside South Africa in order to further its business interests.
- 20.4 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.
- 20.5 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.

20.6 Where relevant, the Client shall procure that all of its personnel, agents, representatives, contractors, sub-contractors, and mandataries shall comply with the provisions of this clause 12 (Personal Information). The CSIR shall be entitled on reasonable notice to conduct an inspection or audit Client's compliance with the requisite POPI Act safeguards.

21. CSIR RESERVES THE RIGHT TO

21.1 Extend the closing date;

21.2 Verify any information contained in a proposal;

21.3 Request documentary proof regarding any tendering issue;

21.4 Give preference to locally manufactured goods;

21.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);

21.6 Award this RFP as a whole or in part;

21.7 Cancel or withdraw this RFP as a whole or in part.

22. 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, tenderers 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 tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

DECLARATION BY TENDERER

Only tenderers who completed the declaration below will be considered for evaluation.

RFP No: 1064/30/01/2023

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in **RFP No. 1064/30/01/2023** at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES	
1
2
DATE:	

ANNEXURE A

Criteria and Percentage Allocation	Specific Description of Criterion	Key Aspects of Criterion	Points	
Company Experience (35%)	The company must have at least five (5) years of experience in the following areas: finance, finance structuring.	Company possesses more than seven (7+) years of experience in the specified areas. Two (2) reference letters with proof of financial services and finance structuring.	10	
		Company possesses five to seven (5 to 7) years of experience in specified areas. Two (2) reference letters with proof of financial services and finance structuring.	7	
		Company possesses three to four (3 to 4) years of experience in specified areas. One (1) reference letter with proof of financial services and finance structuring.	5	
		Company possesses under three (3) years of experience in specified areas. No reference letters included in proposal.	3	
Qualifications of team leader & team 25%	Qualifications: (Team Leader 15% + Member(s) 10%) If no additional team members, the Member 10% is forfeited			
	Team Leader: (15%) <ul style="list-style-type: none"> A minimum of a Bachelor's degree / National Diploma in Finance / Financial management, Economics, MBa or Engineering Preference will be given to suppliers that have attended / courses/workshops in Energy, Resource Efficiency, Sustainability. 	PhD degree or Masters Finance / Financial management, Economics MBa or Engineering AND;	10	
		Honours degree in Finance / Financial management, Economics, MBa or Engineering	7	
	Copies of all certificates for degrees and courses completed must be attached to the proposal		Bachelor's level in Finance / Financial management, Economics, or Engineering.	5
	Qualifications of highest qualified team member. (10%) Team member/s: <ul style="list-style-type: none"> A minimum of a Bachelor's degree/ National Diploma in Finance / financial management, Economics or Engineering. 	Qualification above bachelor's level in Finance / Financial management, Economics or Engineering		10
		Bachelor's degree in finance / Financial management, Economics or Engineering		5
Qualification below Bachelors level in Finance / Financial management, Economics, or Engineering		3		
Approach & Methodology 20%	Proposed Methodology detailing the approach on the provision of the required service	Methodology and sequencing of all tasks (why, when, where, what and how the objectives will be achieved) is clearly shown. Detailed description of approach to ensure that interim and final deliverables are met.	10	
		Adequate explanation of methodology that shows all tasks, sufficient detail is give on approach, with activities properly mapped out, as well explanation of how interim and final deliverables will be met	5	
		Little to no details on approach or methodology. No clear explanation of activities or description of how deliverables will be met	1	

Criteria and Percentage Allocation	Specific Description of Criterion	Key Aspects of Criterion	Points
<i>Project Planning</i> 15%	Clear project plan with accurate scoping and key milestones (explaining how the project will be conducted) Project Plan should have the following: <ul style="list-style-type: none"> Project implementation timeline with all activities to be implemented, milestones and hard-stop dates for interim and final deliverables. Risk mitigation plan 	Project Plan provided and scope includes all activities in detail (Gant chart with clear project milestones, realistic timeframes aligned with budgeted man-days)	10
		Project Plan provided with sufficient detail on scope and activities (Gant chart with project milestones, timeframes given)	5
		Minimal detail on activities, no project plan provided	1
Additional value add elements / ideas 5%	Extra credit for unique idea/s that meet and exceed the stipulated deliverables	Detailed account of uniquely packaged ideas that offer additional value to the target audiences whilst remaining firmly within the project scope.	10
		Additional ideas provided but lacks in detail and/or uniqueness	5
		No additional elements/ ideas presented as part of proposal	0