



Request for Proposals (RFP)

Provision of professional services to develop an ICT Strategy and Transition Roadmap aligned with the new CSIR organisational strategy and/or the implementation of the ICT Strategy and Transition Roadmap on an as and when required basis

RFP No. 3350/07/02/2020

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| Date of Issue | Friday, 13th of December 2019 | |
| Compulsory Briefing Session | Date: Friday, 17 th of January 2020 Time: 10h00 Venue: CSIR Pretoria Campus, Building 23, Project Synapse Nerve Centre Boardroom, N.B: <i>Please bring along the completed NDA signed by duly authorised signatory</i> | |
| Last date for submission of questions/clarifications | 24 th of January 2020 at 16h30 | |
| Closing Date | 7 th of February 2020 at 16h30 | |
| Place | Tender box, CSIR Main Reception, Gate 3 (North Gate) | |
| Enquiries | Strategic Procurement Unit | E-mail: tender@csir.co.za |
| CSIR business hours | 08h00 – 16h30 | |

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RFP STRUCTURE

SECTION A: GENERAL RFP TERMS AND CONDITIONS

SECTION B: FUNCTIONAL OVERVIEW

SECTION C: EVALUATION METHODOLOGY / PROCESS

LIST OF ANNEXURES

- Annexure A – Technical Specification/Scope of Services for New ICT Strategy and Transition Roadmap
- Annexure B - Technical Matrix
- Annexure C – Pricing Schedule
- Annexure D- Certificate of Attendance of the compulsory tender briefing session
- Annexure E- Proposal Form and List of Returnable Documents
- Annexure F- Certificate of Acquaintance with RFP
- Annexure G- Non-Disclosure Agreement
- Annexure H - B-BBEE Preference Point Claim Form
- Annexure I - RFP Clarification Request Form
- Annexure J- SBD 1 Form
- Annexure K- RFP Declaration and Breach of Law Form

1 INTRODUCTION AND INVITATION TO BID

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.

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 professional services to the CSIR to develop an ICT strategy and transition roadmap aligned with our new organisational strategy.

Bid Information

| | |
|---|---|
| DESCRIPTION | Tender for the provision of professional services to the CSIR to develop an ICT strategy and transition roadmap aligned with our new organisational strategy. |
| ACCESS TO THE RFP | This RFP may be downloaded directly from National Treasury's e-Tender Publication Portal at www.etenders.gov.za free of charge. |
| ISSUE DATE | 13 th of December 2019 |
| CLOSING DATE | 7 th of Feb 2020 at 16h30 |
| COMPULSORY TENDER BRIEFING SESSION | <p>The CSIR will hold a compulsory tender briefing session on Friday 17th of January 2020 at 10h00 at the Project Synapse Nerve Centre Boardroom, CSIR Building No. 23. Only bidders who attend the compulsory tender briefing session will be eligible to respond to this tender.</p> <p>Bidders will be required to supply their contact details (email address, telephone numbers and company name) during the briefing session. This is to ensure that any required communication (e.g. addenda and minutes to the RFP briefing session) in relation to this RFP reaches those intending to respond.</p> <p>CSIR will not be held liable if Bidders do not attend the briefing session and therefore get disqualified and/or do not receive the latest information regarding this RFP with the possible consequence of either being disadvantaged or disqualified as a result thereof.</p> <p>Please bring an identity document to the briefing session.</p> |
| LAST DATE OF SUBMISSION OF ENQUIRIES | 24 th of January 2020 @ 16h30 |
| VALIDITY PERIOD | <p>120 Business Days from Closing Date</p> <p>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.</p> |
| ESTIMATE APPOINTMENT DATE | 30 th of April 2020 |

2 FORMAL BRIEFING

A compulsory pre-proposal RFP briefing will be conducted on 17th of January 2020 at 10:00 at the Project Synapse Nerve Centre Boardroom, CSIR Building No. 23 for a period of ± 2 hours. (Respondents to provide own transportation and accommodation). The briefing session will start punctually and information will not be repeated for the benefit of Respondents arriving late.

- A Certificate of Attendance in the form set out in Annexure D hereto must be completed and submitted with your Proposal as proof of attendance to the compulsory tender briefing session.
- Respondents failing to attend the compulsory tender briefing session will be disqualified.
- Respondents are encouraged to bring a copy of the RFP to the compulsory tender briefing session.
- Respondents to bring their own note pads and pens.
- **Please bring along the completed NDA signed by duly authorised signatory**

3 DELIVERY INSTRUCTIONS FOR TENDER

Proposals must be submitted in a sealed envelope addressed as follows:

DESCRIPTION: THE PROVISION OF PROFESSIONAL SERVICES TO THE CSIR TO DEVELOP AN ICT STRATEGY AND TRANSITION ROADMAP ALIGNED WITH THE NEW CSIR ORGANISATIONAL STRATEGY AND/OR THE IMPLEMENTATION OF THE ICT STRATEGY AND TRANSITION ROADMAP ON AN AS AND WHEN REQUIRED BASIS

The name of the bidder must be indicated on the envelope.

Closing date and time: 16h30 on the 7th of February 2020

Closing address (Refer to options in paragraph 3.1 below)

All envelopes must reflect the return address of the Respondent on the reverse side.

3.1 Delivery by hand

If delivered by hand, the envelopes/ files must be deposited in the CSIR tender box which is located at:

CSIR GATE 03 - Main Reception Area (in the Tender box) at the following address:
Council for Scientific and Industrial Research (CSIR)
Meiring Naudé Road
Brummeria
Pretoria

- a) The measurements of the "tender slot" are 27cm x 58.6cm and Respondents must please ensure that response documents or files are no larger than the above dimensions. Responses which are too bulky (i.e. more than 100mm thick) must be split into two or more files, and placed in separate envelopes, each such envelope to be addressed as required in paragraph 3 above.
- b) PLEASE NOTE: CSIR will not be held liable for the safekeeping, confidentiality and/or timeous submission of proposals which fail to comply with the tender slot measurements referred to above.

- c) It should also be noted that the above tender box is located at the street level outside the main entrance and is accessible to the public week days during working hours from 08h00 to 16h30.

3.2 Dispatch and delivery by courier

If dispatched by courier, the envelope must be addressed as follows and delivered to the address on 3.1 above. The RFP must be delivered to the tender box, by the stipulated due date and/or time.

4 MEDIUM OF COMMUNICATION

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

5 B-BBEE AND SOCIO-ECONOMIC OBLIGATIONS

As explained in more detail in the Broad-Based Black Economic Empowerment (BBBEE) Preference Points Claim Form and as prescribed in terms of the Preferential Procurement Policy Framework Act (PPPFA), Act 5 of 2000 and its Regulations, Respondents are to note that CSIR will award preference points to companies who provide valid proof of their B-BBEE status using either the latest version of the generic Codes of Good Practice or Sector Specific Codes (if applicable).

The value of this bid is estimated to be below R50 000 000 (all applicable taxes included); and therefore the 80/20 system shall be applicable. Despite the stipulated preference point system, CSIR shall use the lowest acceptable bid to determine the applicable preference point system in a situation where all received acceptable bids are received outside the stated preference point system.

Respondents are required to complete (the B-BBEE Preference Point Claim Form – Annexure H) and submit it together with valid proof of their B-BBEE Status as stipulated in the Claim Form in order to obtain preference points for their B-BBEE status. Respondents are required at all times to comply with the latest B-BBEE legislation and/or instruction notes as issued from time to time by the DTI.

Note: Failure to submit valid and original (or a certified copy of) proof of the Respondent's compliance with the B-BBEE requirements stipulated in this RFP (the B-BBEE Preference Points Claim Form) at the Closing Date of this RFP, will result in a score of zero being allocated for B-BBEE.

5.1 B-BBEE Joint Ventures or Consortiums

Respondents who would wish to respond to this RFP as a Joint Venture (JV) or consortium with B-BBEE entities, must state their intention to do so in their RFP submission. Such Respondents must also submit a signed JV or consortium agreement between the parties clearly stating the percentage (%) split of business and the associated responsibilities of each party. If such a JV or consortium agreement is unavailable, the partners must submit confirmation in writing of their intention to enter into a JV or consortium agreement should they be awarded business by CSIR through this RFP process. This written confirmation must clearly indicate the percentage (%) split of business and the responsibilities of each party. In such cases, award of business will only take place once a signed copy of a JV or consortium agreement is submitted to CSIR.

Respondents are to note the requirements for B-BBEE compliance of JVs or consortiums as required by the B-BBEE Preference Point Claim Form and submit it together with proof of their B-BBEE Status as stipulated in the Claim Form in order to obtain preference points for their B-BBEE status.

Note: Failure to submit a valid and original B-BBEE certificate for the JV or a certified copy thereof at the Closing Date of this RFP will result in a score of zero being allocated for B-BBEE.

4.1 Subcontracting

CSIR fully endorses Government's transformation and empowerment objectives and when contemplating subcontracting Respondents are requested to give preference to Exempted Micro Enterprises (EMEs), Start-up companies and Qualifying Small Enterprises (QSEs) which are Black Owned, Black Women Owned, Black Youth Owned, companies owned by Black People with Disabilities, including any companies designated as B-BBEE Facilitators¹. (1 The Minister of the Department of Trade and Industry has the power to designate certain Organs of State or Public Entities as B-BBEE Facilitators. For example, the South African National Military Veterans' Association (SANMVA) has been designated as a B-BBEE Facilitator. As such they will be treated as having rights of ownership held 100% by Black People, 40% by Black Women and 20% by Black designated groups.)

Respondents are required to submit proof of the subcontracting arrangement between themselves and the subcontractor. Proof of the subcontracting arrangement may include a subcontracting agreement.

Respondents are to note that it is their responsibility to select competent subcontractors that meet all requirements of the bid so that their bid is not jeopardised by the subcontractor when evaluated. Respondents are responsible for all due diligence on their subcontractors. If contemplating subcontracting, please note that a Respondent will not be awarded points for B-BBEE if it is indicated in its Proposal that such Respondent intends subcontracting more than 25% (twenty-five percent) of the value of the contract to an entity/entities that do not qualify for at least the same points that the Respondent qualifies for, unless the intended subcontractor is an EME with the capability to execute the contract.

Respondent/s are discouraged from subcontracting with their subsidiary companies as this may be interpreted as subcontracting with themselves and / or using their subsidiaries for fronting. Where a Respondent intends to subcontract with their subsidiary this must be declared in their bid response.

The successful Respondent awarded the contract may only enter into a subcontracting arrangement with CSIR's prior approval.

The contract will be concluded between the successful Respondent and CSIR, therefore, the successful Respondent and not the sub-contractor will be held liable for performance in terms of its contractual obligations.

A person awarded a contract may not subcontract more than 25% (twenty-five percent) 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 subcontracted to an EME that has the capability and ability to execute the subcontract.

In terms of this RFP (the B-BBEE Preference Point Claim Form – Annexure H) Respondents are required to indicate the percentage of the contract that will be sub-contracted as well as the B-BBEE status of the sub-contractor/s.

6 COMMUNICATION

- For specific queries relating to this RFP, an RFP Clarification Request Form should be submitted to tender@csir.co.za before 16h30 on the 24th of January 2020 substantially in the form set out in Annexure I hereto. In the interest of fairness and transparency CSIR's response to such a query will then be made available to the other Respondents who have collected RFP documents. For this purpose, CSIR will communicate with Respondents using the contact details provided to the Secretariat on issue of the bid documentation to the Respondent. Kindly ensure that you provide the Secretariat with the correct contact details, as CSIR will not accept responsibility for being unable to contact a bidder who provided incorrect contact details.
- After the closing date of the RFP, a Respondent may only communicate via email to tender@csir.co.za on any matter relating to its RFP Proposal.
- Respondents are to note that changes to its submission will not be considered after the closing date.

Respondents are warned that a Proposal will be liable to disqualification should any attempt be made by a Respondent either directly or indirectly to canvass any officer or employee of CSIR in respect of this RFP between the closing date and the date of the award of the business. Furthermore, Respondents found to be in collusion with one another will be automatically disqualified and restricted from doing business with CSIR in the future.

7 CONFIDENTIALITY

All information related to this RFP is to be treated with strict confidence. In this regard, Respondents are required to certify that they have acquainted themselves with the Non-Disclosure Agreement (Annexure G). All information related to a subsequent contract, both during and after completion thereof, will be treated with strict confidence. Should the need however arise to divulge any information gleaned from provision of the Services, which is either directly or indirectly related to CSIR's business, written approval to divulge such information must be obtained from CSIR.

8 INSTRUCTIONS FOR COMPLETING THE RFP

- Proposals must be submitted in duplicate hard copies (1 original and 1 copy) and must be bound.
- Sign one set of original documents (sign, stamp and date the bottom of each page). This set will serve as the legal and binding copy. A duplicate set of documents is required. This rest must be copies of the original signed Proposal.
- All sets of documents are to be submitted to the address specified above, and Bidders must ensure that the original and copies (where applicable) are identical in all respects as CSIR will not accept any liability for having disqualified a bidder for failing to provide a mandatory returnable document in either the original or the copy of the RFP albeit that it was included in the other.
- An electronic copy (USB) of the RFP Proposal must be submitted. Please provide files in MS Word / Excel format, not scanned PDF versions. (Note that the signed hard copy original set will be legally binding).
- All returnable documents tabled in the Proposal Form (**Annexure E**) must be returned with proposals.

- Unless otherwise expressly stated, all Proposals furnished pursuant to this RFP shall be deemed to be offers. Any exceptions to this statement must be clearly and specifically indicated.
- Any additional conditions must be embodied in an accompanying letter. Alterations, additions or deletions must not be made by the Respondent to the actual RFP documents.

9 COMPLIANCE

The successful Respondent (hereinafter referred to as the Service Provider) shall be in full and complete compliance with any and all applicable laws and regulations.

10 DISCLAIMERS

Respondents are hereby advised that CSIR is not committed to any course of action as a result of its issuance of this RFP and/or its receipt of Proposals. In particular, please note that CSIR reserves the right to:

- Modify the RFP closing date, the required Goods/Services and request Respondents to re-bid on any such changes;
- Reject any Proposal which does not conform to instructions and specifications which are detailed herein;
- Disqualify Proposals submitted after the stated submission deadline (closing date);
- Not necessarily accept the lowest priced Proposal or an alternative bid;
- Reject all Proposals, if it so decides;
- Withdraw the RFP on good cause shown;
- Award a contract in connection with this Proposal at any time after the RFP's closing date;
- Award a contract for only a portion of the proposed Goods which are reflected in the scope of this RFP;
- Split the award of the contract between more than one Service Provider (whether or not they submitted a joint proposal), should it at CSIR's discretion be more advantageous in terms of, amongst others, cost or developmental considerations;
- Make no award of a contract;
- Validate any information submitted by Respondents in response to this bid. This would include, but is not limited to, requesting the Respondents to provide supporting evidence. By submitting a bid, Respondents hereby irrevocably grant the necessary consent to CSIR to do so;
- Request audited financial statements or other documentation for the purposes of a due diligence exercise; and/or
- Not accept any changes or purported changes by the Respondent to the bid rates after the closing date and/or after the award of the business, unless the contract specifically provided for it.

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.

Should a contract be awarded on the strength of information furnished by the Respondent, which after conclusion of the contract, is proven to have been incorrect, CSIR reserves the right to cancel the contract and/or place the Respondent on CSIR's list of Restricted / Blacklisted Suppliers.

CSIR reserves the right to undertake post-tender negotiations (PTN) with selected Respondents or any number of short-listed Respondents, such PTN to include, at CSIR's option, price negotiations and any evaluation criteria listed in this RFP document. In the event of any Respondent being notified of such short-listed/preferred bidder status, his bid, as well as any subsequent negotiated best and final offers (BAFO), will automatically be deemed to remain valid during the negotiation period and until the ultimate award of business.

Should the preferred bidder fail to sign or commence with the contract within a reasonable period after being requested to do so, CSIR reserves the right to award the business to the next ranked bidder, provided that he/she is still prepared to provide the required goods at the quoted price. Under such circumstances, the validity of the bids of the next ranked bidder(s) will be deemed to remain valid. Bidders may therefore be requested to advise whether they would still be prepared to provide the required goods at their quoted price.

The minimum Technical Evaluation threshold is 70% (seventy percent).

Kindly note that CSIR will not reimburse any Respondent for any preparatory costs or other work performed in connection with its Proposal, whether or not the Respondent is awarded a contract. Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer 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.

11 LEGAL REVIEW

A Proposal submitted by a Respondent will be subjected to review prior to consideration for an award of business. A material deviation could result in disqualification.

12 BACKGROUND

The CSIR has recently completed a process of developing a new organisational strategy. The strategy sets out how the organisation will leverage its strong science, engineering and technology (SET) capability base and build on current industrial development opportunities to create the right balance between scientific and industrial development in its innovation portfolio, supporting socio-economic development and a capable State, whilst maintaining good governance and financial sustainability.

Against the backdrop of poor economic performance, driven by global megatrends such as geopolitical uncertainties, the lingering effects of the 2008/09 global recession, and urbanisation, to name but a few, the CSIR's strategic intent is to rapidly advance to a situation where its SET and industrial development endeavours become force multipliers that contribute to the competitiveness of South Africa's economy.

The organisation has implemented a new business model and operating model to achieve the strategy. Other critical organisational changes include having appropriate organisational support structures, services, systems, tools and processes that will enable and embed an agile, efficient, effective, integrated and collaborative new way of working.

A "fit-for-purpose", cost effective, integrated and enabling organisational ICT support service, infrastructure and strategy is key to the successful implementation of the new organisational strategy.

This RFP (Request for Proposal) is our initiation of the process to review our ICT Strategy and Roadmap, to ensure that we have a technologically modernised, integrated, secure, cost-effective and fit-for-purpose ICT support service that embraces and utilises the scope of appropriate technology platforms and an appropriate operating model to support the CSIR's Industrialisation Strategy. Ultimately, the overarching goal of the CSIR ICT Strategy and Roadmap are to provide the CSIR with the necessary ICT support structure, services, systems, tools, processes and investment plan that aligns to the CSIR's strategic objectives.

13 INVITATION FOR PROPOSAL

Proposals are hereby invited for the provision of specialised, professional consulting services to the CSIR to develop an ICT Strategy and ICT Roadmap to enable the CSIR's new organisational strategy. This will require reviewing the current ICT Strategy (including support structure, operating model, services, systems, infrastructure, tools and processes) and develop a new ICT strategy that will allow the CSIR to develop into a modern, integrated, secure and digitally enabled organisation and the development of an ICT Roadmap with the attendant Implementation Plan.

14 PROPOSAL SPECIFICATION/ OVERVIEW

Tenderers to submit tenders in both document and Powerpoint presentation summary format.

The purpose of the RFP is to seek potential, qualified service providers to review the current CSIR ICT Strategy (in the context of the new defined CSIR organisational Strategy) and to develop a revised, aligned ICT strategy and Transition Roadmap to empower the organisation and its leadership to make improved business and technology investment decisions, and to facilitate efficiency, effectiveness and agility in the workplace.

With the advent of the new CSIR strategy, it is vital that an organisational ICT Roadmap is developed because it is a core instrument in the realising of an "ICT Future State" for CSIR. The Industrial Development focus of the CSIR Strategy, the CSIR Campus Master Plan, the Information Security Strategy, are but some of the key organisational strategic initiatives that need to be referenced and/or inform the review of the CSIR ICT Strategy and the CSIR ICT Roadmap. The relevant summary information in this regard will be shared at the compulsory briefing session.

Compulsory Briefing Session Certificate and Non-Disclosure Agreement

Bidders must submit a completed Annexures E and H to be considered.

Please bring along the completed NDA signed by duly authorised signatory

SECTION C: EVALUATION METHODOLOGY / PROCESS

15 EVALUATION METHODOLOGY

Table 1: Tender Evaluation Methodology

| Stage 1 | Stage 2 | Stage 3 | Stage 4 | Stage 5 | Stage 6 |
|----------------------------------|----------------------------------|--|--|--|---|
| Administrative Responsiveness | Substantive Responsiveness | 70% Overall Minimum Threshold and 50% on each category | Weighted Scoring / 100 Price /TCO (80) B-BBEE (20) | Post tender negotiation (if applicable) requesting best & final offer. Final evaluation in terms of 80/20 | Negotiation of final terms & conditions of contract including i.e. SD, price, B-BBEE, technical aspects with the successful bidder/s. |
| RETURNABLE DOCUMENTS & SCHEDULES | RETURNABLE DOCUMENTS & SCHEDULES | TECHNICAL | WEIGHTED SCORE | POST TENDER NEGOTIATION & FINAL WEIGHTED SCORE | FINAL AWARD |

NB: Evaluation of the various stages will normally take place in a sequential manner. However, in order to expedite the process, CSIR reserves the right to conduct the different stages of the evaluation process in parallel. In such instances the evaluation of bidders at any given stage must not be interpreted to mean that bidders have necessarily passed any previous stage(s).

15.1 STAGE ONE: Test for Administrative Responsiveness

The test for administrative responsiveness will, without limitation include the following:

Table 2: Administrative responsiveness requirements

| Administrative responsiveness check | RFP Reference |
|--|-----------------------------|
| Whether the Bid has been lodged on time | Section A of this RFP |
| Whether all Returnable Documents and/or schedules (where applicable) were completed and returned by the closing date and time to the correct location. | Section A and B of this RFP |
| Verify the validity of all returnable documents | Section A of this RFP |

The test for administrative responsiveness (Stage One) must be passed for a Respondent's Proposal to progress to Stage Two for further pre-qualification

15.2 STAGE TWO: Test for Substantive Responsiveness to RFP

The test for substantive responsiveness to this RFP will include the following:

Table 3: Substantive responsiveness requirements

| Substantive responsiveness check | RFP Reference |
|----------------------------------|---------------|
|----------------------------------|---------------|

| | |
|---|--|
| Whether any eligibility and/or pre-qualification criteria set by CSIR have been met | Section A and B of the RFP |
| Whether the Bid materially complies with the scope and/or specification | Section B of the RFP Completed Annexure B |

15.3 STAGE THREE: Minimum Threshold 70% for Technical Criteria (as stipulated on Annexure B)

The test for the Technical and Functional threshold will include the elements as stipulated in **Annexure B**. The applicable values will be utilised when scoring each criterion, as stipulated in **Annexure B**.

The Technical Evaluation Process consists of the following:

- Proposals with technical score of less than the predetermined minimum overall percentage of 70% or less than 50% on any of the individual criteria category will be eliminated from further evaluation.
- The weighting for each category for the technical evaluation is provided in the table below:

Table 4: Technical Category Weighting

| Technical Criteria | Weighting |
|---|-----------|
| <p>Team Experience: The team must have a demonstrated experience, in drafting ICT strategies that have been implemented successfully. The team leader must have not less than 10 years managing strategic ICT interventions/ processes. Experience in working with organisations similar to CSIR in the past 5 years would be a strong advantage.</p> | 20 |
| <p>References The company must have not less than 5 references where similar strategic ICT services were successfully rendered to organisations of a similar stature/nature to CSIR.</p> | 15 |
| <p>Methodology/approach and overall technical proposal The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. An in-depth understanding of the CSIR and its role and mandate is required. A detailed approach, methodology and tools on how they will assist CSIR in achieving the objectives of this request, must be provided, including an outline of the project deliverables and artefacts, indicating key milestones and turnaround times. Detailed costing and project schedule is critical. This strategy needs to take full account of current digital strategies world-wide, including issues such as 4IR.</p> | 45 |
| <p>Presentation: High level presentation clearly indicating the understanding of the requirements and providing the methodology, approach and tools to provide the deliverables requested.</p> | 20 |

| Technical Criteria | Weighting |
|--------------------|------------|
| Total | 100 points |

Respondents are to note that CSIR will round off final technical scores to the nearest 2 (two) decimal places for the purposes of determining whether the technical threshold has been met.

The minimum threshold for technical/functionality (Stage Three) must be met or exceeded for a Respondent's Proposal to progress to Stage Four for final evaluation

15.4 STAGE FOUR: Commercial and Final Weighted Scoring

a) Price Criteria (Weighted score 80 points):

Table 5: Price and TCO criteria

| Evaluation Criteria | RFP Reference |
|---|---------------|
| Commercial offer | Annexure C. |
| <ul style="list-style-type: none"> Commercial discounts (Only unconditional discounts will be taken into account during evaluation. A discount which has been offered conditionally will, despite not being taken into account for evaluation purposes, be implemented when payment is effected) Price adjustment conditions / factors. | |

CSIR will utilise the following formula in its evaluation of Price:

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

b) Broad-Based Black Economic Empowerment criteria (Weighted score 20 points)

- B-BBEE - current scorecard / B-BBEE Preference Points Claims Form
- Preference points will be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table indicated in the B-BBEE Preference Points Claim Form.

Pricing Proposal

- The Pricing Schedules (Annexure C) are a mandatory submission designed to facilitate evaluation. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.
- Pricing proposal must be cross-referenced to the respective 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.
- Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.
- 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.
- Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise

duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract.

- Non-firm price is all prices other than “firm” prices.
- Payment will be according to the CSIR Payment Terms and Conditions.

15.5 SUMMARY: Applicable Thresholds and Final Evaluated Weightings

Table 6: Functional Threshold

| Thresholds | Minimum Percentage |
|---------------------------|--------------------|
| Technical / functionality | 70% |

Table 7: Final Evaluated Weightings

| Evaluation Criteria | Final Weighted Scores |
|-----------------------------------|-----------------------|
| Price and Total Cost of Ownership | 80 |
| B-BBEE - Scorecard | 20 |
| TOTAL SCORE | 100 |

15.6 STAGE FIVE: Post Tender Negotiations (if applicable)

CSIR reserves the right to conduct post tender negotiations on any elements of the RFP with a shortlist of Respondent(s). The shortlist could comprise of one or more Respondents. Should CSIR conduct post tender negotiations, Respondents will be requested to provide their best and final offers to CSIR based on such negotiations. A final evaluation will be conducted in terms of 80/20 and the contract will be negotiated and awarded to the successful Respondent(s).

15.7 STAGE SIX: Final Contract Award

CSIR will negotiate the final terms and conditions of the contract with the successful Respondent(s). This may include aspects such as Enterprise and/or Supplier Development, the B-BBEE Improvement Plan, price, technical, lead times and/or delivery. Thereafter the final contract will be awarded to the successful Respondent(s).

16 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Proposals submitted at incorrect location;
- Non-attendance of the compulsory briefing session: and
- Non-signature and submission of the Non-Disclosure Agreement

17 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. Respondents must register on the CSD prior to submitting their bids. 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. The CSD can be accessed at <https://secure.csd.gov.za/>. Respondents are required to provide the following to CSIR in order to enable it to verify information on the CSD: Supplier Number: _____ Unique registration reference number: _____.

18 TAX COMPLIANCE

Respondents must be compliant when submitting a proposal to CSIR and remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).

It is a condition of this bid that the tax matters of the successful Respondents be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the Respondents tax obligations.

The Tax Compliance status requirements are also applicable to foreign Respondents/ individuals who wish to submit bids.

It is a requirement that bidders grant a written confirmation when submitting this bid that SARS may on an ongoing basis during the tenure of the contract disclose the bidder's tax compliance status and by submitting this bid such confirmation is deemed to have been granted.

Where Consortia / Joint Ventures / Sub-contractors are involved, each party must be registered on the Central Supplier Database and their tax compliance status will be verified through the Central Supplier Database. For this purpose, the attached SBD 1 Form (Annexure J) must be completed and submitted as an essential returnable document by the closing date and time of the bid.

19 PROTECTION OF PERSONAL DATA

In responding to this bid, CSIR acknowledges that it may obtain and have access to personal data of the Respondents. CSIR agrees that it shall only process the information disclosed by Respondents in their response to this bid for the purpose of evaluating and subsequent award of business and in accordance with any applicable law. Furthermore, CSIR will not otherwise modify, amend or alter any personal data submitted by Respondents or disclose or permit the disclosure of any personal data to any Third Party without the prior written consent from the Respondents. Similarly, CSIR requires Respondents to process any personal information disclosed by CSIR in the bidding process in the same manner.

CSIR urges its clients, suppliers and the general public to report any fraud or corruption to The CSIR Ethics Hotline: 0800 222 584 which operates 24 hours a day, 7 days a week, 365 days per year.

20 SUBMISSION OF PROPOSALS

- All proposals are to be sealed. No open proposals will be accepted.
- All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package. Proposals must consist of two parts, each of which is placed in a separate sealed package clearly marked:
 - PART 1: Technical Proposal:
 - PART 2: Pricing Proposal, B-BBEE and other Mandatory Documentation:
- Proposals submitted by companies must be signed by a person or persons duly authorised.

- 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.

21 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **7 February 2020** 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 place, it will be regarded as a late tender. Late tenders will not be considered.

22 AWARDING OF TENDERS

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.

23 EVALUATION PROCESS

23.1 Evaluation of proposals

All proposals will be evaluated by an evaluation team 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 tenderers.

A two-phase evaluation process will be followed.

- The first phase includes evaluation of **elimination** and **functionality criteria**, local production and content.
- The second phase includes the evaluation of **price** and **B-BBEE** status.

Pricing Proposals will only be considered after 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.

23.2 Preference points system

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

24 PRICING PROPOSAL

- 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.
- Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.
- Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.
- 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.

**Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;*

***Non-firm price is all prices other than “firm” prices.*

- Payment will be according to the CSIR Payment Terms and Conditions.

25 APPOINTMENT OF SERVICE PROVIDER

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

26 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 3350/07/02/2020 - The provision of professional services to the CSIR to develop an ICT strategy and transition roadmap aligned with the new CSIR organisational strategy and/or the implementation of the ICT strategy and transition roadmap on an as and when required basis”*** as the subject. This must be in the format provided for in Annexure I.

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.

27 CORRECTNESS OF RESPONSES

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

28 VERIFICATION OF DOCUMENTS

- Tenderers should check the numbers of the pages to satisfy themselves that none are 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.
- One hard copy and one electronic copy (CD or USB memory key) of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.
- Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.
- If a courier service company is being used for delivery of the proposal document, the RFP description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered to the tender box, by the stipulated due date.

29 SUB-CONTRACTING

- 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.
- 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.

30 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.

31 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, where applicable:
- Only economy class tickets will be used.
- A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.
- No car rentals of more than a Group B will be accommodated.

32 ADDITIONAL TERMS AND CONDITIONS

- 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.
- Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 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;
 - The Tax Clearance Certificate of each joint venture member;
 - Proof of ownership/shareholder certificates/copies; and
 - Company registration certificates.
- 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.
- Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.