

Request for Proposals (RFP)

The provision of Independent Review and Impact Study of the Office of Digital Advantage – The PMU for Facilitating the Implementation of the National ICT Research Development and Innovation Roadmap services

RFP No. 3425/25/02/2021

Date of Issue	11 February 2021	
Closing Date	25 February 2021 @ 16:30 (by close of business day)	
Place	Email to tender@csir.co.za . Subject of email should contain the following: RFP 3425/25/02/2021	
Enquiries	Strategic Procurement Unit	E-mail: tender@csir.co.za
CSIR business hours	08h00 – 16h30	
Category	Consulting Services	

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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

2.1 Towards Digital Advantage: ICT RDI Roadmap (2013-2023)

Research, development and Innovation (RDI) in the Information and Communication Technology (ICT) sector is important for boosting the competitiveness of economies. As highlighted in the National Development Plan 2012, South Africa had lost its status as continental leader in broadband and connectivity. This may be partly because South Africa had been under-investing in ICT research and development (R&D) in comparison to its economic peers such as Brazil, Australia and South Korea.

In order to capture the full value of RDI for South Africa, the Department of Science and Innovation (DSI) in partnership with CSIR developed the ten-year ICT Research, Development and Innovation (RDI) Roadmap [ICT RDI Roadmap 2013-2023]. It is a long-term investment and implementation plan to deliver significant socio-economic impact for South Africa via a coherent and targeted portfolio of ICT RDI interventions and programmes.

The roadmap provides guidance and support for this objective in the three key areas: (1) to help strengthen the ICT RDI ecosystem in South Africa through partnership by academia, research institutions, business, government departments and international partners; (2) to facilitate a significant increase in the ICT RDI investments; and (3) to provide a platform for informed decision-making with respect to choices of strategic areas of focus, and the associated allocation of funding.

Together with NSI partners, the DSI seeks to attain the achievement of the ICT RDI Roadmap objectives, including the following:

- Investment: To enable an increase in public and private investment in ICT RDI activities to R9 billion over a 10-year period (2013 – 2023);
- Exporting: To position the South African ICT sector as a globally competitive player with the country exporting indigenous ICT technologies and services;
- Socio-economic: To guide ICT RDI activities to focus explicitly on the delivery of strategic social and economic advantages;
- National priorities: To improve government performance on national priorities in areas such as health, the environment, poverty alleviation, education and national productivity; and
- Industrial growth & jobs: To enable the creation of more than 2 000 new businesses at various levels that can generate more than 4 000 permanent high-tech jobs and almost 20 000 other jobs over a 10-year period.

To facilitate and catalyse the implementation, the Roadmap framework recommended the establishment of a portfolio management unit (PMU), which was branded as the Office of Digital Advantage (ODA). The ODA has since been in operation between 2016 and 2021.

2.2 Establishment of a Portfolio Management Unit (Office of Digital Advantage) as the facilitator for the implementation of the ICT RDI Roadmap

The Office of Digital Advantage (ODA) is the Department of Science and Innovation's (DSI's) implementation, management, analysis and reporting mechanism to ensure the successful execution of its Information and Communication Technology (ICT) Research, Development and Innovation (RDI) Roadmap (DSI ICT RDI Roadmap) over the course of the next decade. The ODA is hosted by the CSIR.

The ODA is defined by 5 key activities:

- (1) Roadmap Implementation, Understanding, Prioritisation and Updates;
- (2) Roadmap Investment and Implementation Partnership Development;
- (3) Roadmap Funding Strategy and Implementation Criteria;
- (4) Roadmap Visibility, Communications and Marketing; and

(5) Monitoring, Evaluation, Reflection and Learning on Roadmap Implementation.

Note that as per the initial agreement between DSI and CSIR, the establishment and operations of the Office of Digital Advantage was approved for a limited period. Now the date for the closure of the PMU has been set for the 30th of April 2021.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited for the provision of Independent Review and Impact Study of the Office of Digital Advantage – The PMU for Facilitating the Implementation of the National ICT Research Development and Innovation Roadmap to the CSIR.

4 PROPOSAL SPECIFICATION

The study should focus on the review of performance, impact and gaps of the Office of Digital Advantage operations as well as briefly reflection at high level on the overall progress to date of the ICT RDI Roadmap Implementation.

The responsibility of the service provider will include:

- *Undertake a review and impact assessment of the performance, outputs, outcomes and impact of the ODA function in its entirety against agreed commitments with the Department of Science and Innovation between 2016 and 2021;*
- *Review of the ODA strategic and operational reports and documents (including terms of reference, SOPs and processes, business plans, quarterly reports, annual reports, periodic glossy roadmap publications, activity logs, agreements, minutes, etc.)*
- *Assessment of the ODA/Roadmap's Monitoring and Evaluation Dashboard Information System at high level (including fit-for-purpose review, usage logs, data/system security, data integrity, quality control, technology management)*
- *Review the 27 Market Opportunity Basic Analysis Reports that were completed by external experts.*
- *Analyse independent review reports of the ODA and the Roadmap implementation, which were compiled by National Advisory Council on Innovation (NACI) and universities.*
- *Conduct interviews or surveys with most relevant stakeholders including 5 or more government departments, 5 or more DSI's entities, 5 or more relevant government*

agencies, 5 or more universities, 5 or more IT industry role players, 5 or more research councils, NACI, 5 or more African countries and SADC office, 2 or more foreign embassies in South Africa, etc.

- *Assessment stakeholder reviews from independent sources (such as sentiments about ODA by mainstream media e.g. IT Web website and social media platforms)*
- *Conduct site visits to some of the projects' facilities (to validate portfolio of evidence)*

The following deliverables are expected in the assessment of achievements:

- *Comprehensive Final Report (in a hard copy and a soft copy)*
- *Microsoft PowerPoint Slides*
- *Presentation to DSI Executive Committee meeting, DSI-CSIR's ODA Planning and Monitoring Committee (PMC), DSI-CSIR's ODA Operations Committee (Opco), CSIR management team, and other stakeholders.*

Payment will commence after the acceptance of each deliverable described above.

5 FUNCTIONAL EVALUATION CRITERIA

All proposals will be evaluated by an evaluation team consisting of members of the DSI and CSIR governance team (known as ODA Operations Committee), for functionality, price and B-BBEE. Based on the results of the evaluation process, the CSIR will approve the awarding of the Contract to successful bidder(s).

The following functionality criteria will be utilised for the evaluation:

Criteria Scoring	Score/Criteria (1-10)	Weighting
Company profile and experience: The bidder must have the minimum of 5 years' experience in ICT and RDI Review or Impact Study compilation	4 - 5 years' experience and above = 10 2 - 3 years' experience and below = 5	20%

	1 years' experience = 1	
Project team: The project leader's <i>capability and experience in embarking on similar review / impact studies within the ICT sector. [Profiles or resumes of the team members to be submitted]</i>	4 - 5 years' experience and above = 10 2 - 3 years' experience and below = 5 1 years' experience = 1	20%
Proposal: The proposal must be detailed with an indication of the below: <ul style="list-style-type: none"> • <i>Articulate the understanding of the overall requirements of the project as per the defined scope.</i> • <i>Design and cost an appropriate and feasible evaluation with appropriate questions and methods, based on the evaluation's purpose and objectives. This must include a provision of a detailed project plan, methodology and quality of activity-based plan.</i> • <i>Demonstrated systematically gathering, analysing, and synthesising relevant evidence, data and information from a range of sources, identifying relevant material, assessing its quality, spotting gaps, perform and implement data analysis and writing up the final reports.</i> 	Excellent proposal which demonstrates all requirements listed in the criteria scoring and methodology = 10 Average proposal which demonstrates some of the requirements listed in criteria scoring and methodology = 5 Poor proposal which does not meet requirements listed on the scoring criteria and methodology = 1	40%
References: Previous related Review and/or Impact Study done which must be demonstrated by signed letters of testimonials NB: Reference letters on the company letterhead should be attached	5 or more testimonials = 10 3 – 4 testimonials = 5 1 -2 testimonial = 1	20%

Total Weighted Score		100%
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Pricing Proposals will only be considered after functionality phase has been evaluated and accepted according to minimum qualification score. Only quotations that achieved a minimum qualification score of 70 for functionality will be evaluated further using the 80/20 preferential scoring system –where 80 points will be dedicated to price and 20 points to B-BBEE status.

6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline; and
- Proposals submitted at incorrect location.

7 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 the CSIR with a certified copy of their 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

8 TENDER PROGRAMME

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

- Issue of tender documents: 11 February 2021
- Last date for submission of queries: 18 February 2021 @ 16:30
- Closing / submission Date: 25 February 2021

9 SUBMISSION OF PROPOSALS

- 9.1 RFP responses and submissions may be submitted electronically to tender@csir.co.za. email address by 25 February 2021 @ 16:30 (by close of business day). Subject of email should contain the following: RESPONSE: RFP 3425/25/02/2021. 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.

10 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of Friday, **25 February 2021** 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.

11 AWARDING OF TENDERS

- 11.1 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.

12 EVALUATION PROCESS

12.1 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**
- 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.

12.2 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.

13 PRICING PROPOSAL

- 13.1 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.
- 13.2 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.
- 13.3 Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.
- 13.4 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.*

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

14 VALIDITY PERIOD OF PROPOSAL

Each **proposal** shall be valid for a minimum period of three (3) months calculated from the closing date.

15 APPOINTMENT OF SERVICE PROVIDER

15.1 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.

15.2 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.

15.3 Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

16 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 3425/25/02/2021 - The provision of Independent Review and Impact Study of the Office of Digital Advantage – The PMU for Facilitating the Implementation of the National ICT Research Development and Innovation Roadmap services”**.

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.

17 MEDIUM OF COMMUNICATION

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

18 COST OF PROPOSAL

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.

19 CORRECTNESS OF RESPONSES

19.1 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.

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

20 VERIFICATION OF DOCUMENTS

20.1 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.

20.2 *All tenders to be submitted via email to tender@csir.co.za. The email subject should be the tender number.* 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.

21 SUB-CONTRACTING

21.1 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.

- 21.2 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.

22 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

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

23 TRAVEL EXPENSES

- 23.1 All travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imbursments, must be in line with the CSIR's travel policy. The following will apply:
- 23.1.1 Only economy class tickets will be used.
- 23.1.2 No car rentals of more than a Group B will be accommodated.

24 ADDITIONAL TERMS AND CONDITIONS

- 24.1 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.
- 24.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 24.3 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;
- The Tax Clearance Certificate of each joint venture member;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificates.

24.4 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.

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

25 CSIR RESERVES THE RIGHT TO

25.1 Extend the closing date;

25.2 Verify any information contained in a proposal;

25.3 Request documentary proof regarding any tendering issue;

25.4 Give preference to locally manufactured goods;

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

25.6 Award this RFP as a whole or in part;

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

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, 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:

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..... 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:

27 ANNEXURE A

Criteria Scoring	Score/Criteria (1-10)	Weighting
Company profile and experience: The bidder must have the minimum of 5 years' experience in ICT and RDI Review or Impact Study compilation	4 - 5 years' experience and above = 10 2 - 3 years' experience and bellow = 5 1 years' experience = 1	20%
Project team: The project leader's <i>capability and experience in embarking on similar review / impact studies within the ICT sector. [Profiles or resumes of the team members to be submitted]</i>	4 - 5 years' experience and above = 10 2 - 3 years' experience and bellow = 5 1 years' experience = 1	20%
Proposal: The proposal must be detailed with an indication of the below: <ul style="list-style-type: none"> • <i>Articulate the understanding of the overall requirements of the project as per the defined scope.</i> • <i>Design and cost an appropriate and feasible evaluation with appropriate questions and methods, based on the evaluation's purpose and objectives. This must include a provision of a detailed project plan, methodology and quality of activity-based plan.</i> • <i>Demonstrated systematically gathering, analysing, and synthesising relevant evidence, data and information from a range of sources, identifying relevant material, assessing its quality, spotting gaps, perform and implement data analysis and writing up the final reports.</i> 	Excellent proposal demonstrating all requirements listed in the criteria scoring and methodology = 10 Average proposal demonstrating some of the requirements listed in criteria scoring and methodology = 5 Poor proposal which does not meet requirements listed on	40%

	the scoring criteria and methodology = 1	
References: Previous related Review and/or Impact Study done which must be demonstrated by signed letters of testimonials NB: Reference letters on the company letterhead should be attached	5 or more testimonials = 10 3 – 4 testimonials = 5 1 -2 testimonial = 1	20%
Total Weighted Score		100%