



## Request for proposals (RFP)

### The Provision for supply of Bulk email System to CSIR

**RFP No. 3486/05/11/2021**

<b>Date of issue</b>	Wednesday, 20 October 2021
<b>Intent to Bid</b>	Tuesday 26, October 2021 @ 12h00-13h00
<b>Compulsory Briefing Session</b>	Wednesday, 27 October 2021 Link to be shared 24 hours before
<b>Closing Date and Time</b>	Friday, 05 November 2021 @ 16:30 – Late bids will not be considered
<b>Submission of responses</b>	All responses must be submitted to: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a> Submissions cannot be submitted to any other address, as this will lead to elimination.
<b>Contact details</b>	Submission of enquiries: All enquiries must be submitted to <a href="mailto:tender@csir.co.za">tender@csir.co.za</a> . <b><i>(Please use the RFQ number as the subject reference)</i></b>
<b>CSIR Business Hours</b>	08:00 – 16:30

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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**

The CSIR requires the implementation of a system that can send more than 350 000 emails per day which qualifies it as a bulk email solution.

### **3 INVITATION FOR PROPOSAL**

Proposals are hereby invited for the supply and implementation of a Bulk emailing solution to the CSIR.

### **4 PROPOSAL SPECIFICATION**

The CSIR requires a scalable third-party cloud bulk mail service, however, the management of contact lists, templates etc are required to be hosted on-premise inside the CSIR datacentre. This will allow the CSIR to login to the system, hosted on-premise, generate templates and emails for smaller distribution groups and bulk mail, distributed directly with the cloud mail system. The bidder must provide a satisfactory track record of service stability, up time and throughput as well as a minimum of 5 client references. The mail servers must be within the borders of South Africa. The solution must adhere to local and international privacy laws. The service provided will be required to enter into a contract agreement with the CSIR.

**Primary Scope:**

The system must deliver email through a secure SMTP Service, integrated with an on prem CSIR application, for public and internal communications.

**Deliverable:**

The successful bidder needs to provide, implement/enable a secure 3rd party SMTP for *Scenario 1* and install Mail Authoring software for *Scenario 2* (CSIR on-premises)

**Scenario 1:** Secure SMTP service with no storage or caching on SMTP service for

- Large volume emails
- Low Complexity emails
- Sent directly from an on prem application – Integration will be in corporation with the on prem application onsite team
- User base: 350k per day (peak) and 1M burst
- Use Case: Reminders, confirmations, etc.

**Scenario 2:** Authoring service (CRM Style) installed on CSIR infrastructure in the CSIR datacentre

- CSIR user can create new emails and distribute to address book
- Allow for Data to be imported from another 3rd part application (e.g., Schedulers)
- Small volume
- High Complexity emails
- Sent directly from the Authoring tool
- User base: 1k per day (peak)
- Use Case: Scheduling Administrator & Corporate Comms

**Restriction:**

The following restrictions apply:

- **No CSIR data, content or contacts** must be stored on the cloud or third-party services. Confirmation of such must be provided by the successful bidder and assessed as part of a risk assessment.
- The service providers **mail servers must be** within and remain in the borders of South Africa and the bidder must provide confirmation as such.

**Timelines:**

The service will be procured via the CSIR tender processes. Once the purchase order is issued, the service must be implemented, tested, and promoted to production within two (2) months.

**5 PRICING SCHEDULE**

Item	Description	Size/UoM	Quantity	Total Price
1	The supply and implementation of a Bulk emailing solution to the CSIR.	Each	1	
2	Maintenance and Support (One year)		1	
<b>NB: Pricing must be inclusive of all costs to be incurred by the bidder in the delivery of the required services, including any disbursement.</b>				
<b>Sub-Total</b>				
<b>VAT 15%</b>				
<b>Total</b>				

**6 FUNCTIONAL EVALUATION CRITERIA**

Category	Criteria	Score	Weight
Compatibility 20%	Installation compatible with Linux or virtual appliance	Installation compatible with Linux = 20 Virtual Appliance = 10 Neither = 0	20%
Connectivity 20%	Site-to-site VPN between on prem and cloud smtp	Site-to-site vpn =5 No site-to-site vpn = 0	5%
	Secure REST API (HTTPS)	Secure Rest API = 5 No secure REST API = 0	5%
	Secure SMTP	Secure SMTP = 5 No secure SMTP = 0	5%
	Token-Based authentication (API)	Token-based API authentication = 5 No token-based API authentication = 0	5%
Functionality 25%	Address book with groups / Distribution lists	With address book = 5 No address book = 0	5%
	Templates	Has Templates = 5 No Templates = 0	5%
	Reporting	Has reporting = 5 No Reporting = 0	5%

Category	Criteria	Score	Weight
	Billing metrics to track extra spend	Has billing metrics = 5 No billing metrics = 0	5%
	Burst up to 1 million emails a day	Burst up to 1mill included = 5 No burst included = 0	5%
Availability 30%	Provide proof of the availability of the system for the past 12 months	>= 99.999% (five nines) = 30 99.99% (four nines) = 20 99.95% = 10 </= 99.9% (three nines) = 0	30%
References 5%	Provide at least five client references with relevant experience on a similar bulk email implementation	5 client references provided = 5 Less than 5 references = 0	5%
Total			100%

6.1 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 75% will be eliminated from further evaluation.

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

## 7 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Non-attendance of the online compulsory briefing session.
- All hand-delivered, posted, or hard copies for this proposal will not be considered. All Proposals to be submitted online to E-mail: [tender@csir.co.za](mailto:tender@csir.co.za). Proposals submitted at incorrect e-mail addresses will not be considered.
- Submission after the deadline.
- Cloud submissions via dropbox, Wetransfer, Google Drive, etc will not be accepted.
- Unable to send a minimum of 350K emails per day.
- No on premise install possible.
- SMTP servers not within the borders of South Africa.
- Any data or contact information that will be stored on cloud systems.

## 8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE 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](http://www.csd.gov.za);
- provide the CSIR of their CSD registration number; and
- provide the CSIR with a valid copy of their SANAS accredited B-BBEE certificate or sworn affidavit. If no certificate/affidavit can be provided, no points will be scored during the evaluation process. (RSA suppliers only)

## SECTION B – TERMS AND CONDITIONS

### 9 PROCEDURE FOR SUBMISSION OF PROPOSALS

- 9.1 All proposals must be submitted electronically to [tender@csir.co.za](mailto:tender@csir.co.za).
- 9.2 Respondents must use the RFP number as the subject reference number when submitting their bids.
- 9.3 The e-mail and file sizes should not exceed a total of 25MB per e-mail.
- 9.4 The naming/labeling syntax of files or documents must be short and simple (e.g., Product Catalogues).
- 9.5 All documents submitted electronically via e-mail must be clear and visible.
- 9.6 All proposals, documents, and late submissions after the due date will not be evaluated.

**NB: NO HARD COPIES OR PHYSICAL SUBMISSIONS WILL BE ACCEPTED**

### 10 TENDER PROGRAMME

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

- Issue of tender documents: 20 October 2021
- Closing date to submit intent to bid 26 October 2021
- Compulsory Briefing session 27 October 2021
- Closing / submission Date: 05 November 2021
- Estimate appointment date of successful tenderer: 15 November 2021

## 11 SUBMISSION OF PROPOSALS

12.1 All proposals are to be submitted electronically to tender@csir.co.za. No late proposals will be accepted. Responses submitted by companies must be signed by a person or persons duly authorised.

11.2 All emailed proposal submissions are to be clearly subject-referenced with the RFP number.

11.3 All emailed proposal submissions are to be clearly subject-referenced with the RFP number.

11.4 Proposals must consist of two parts, each of which must be sent in two separate emails with the following subject:

**PART 1:** Technical Proposal:

**PART 2:** Pricing Proposal, B-BBEE and other Mandatory Documentation:

11.5 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.

11.6 Proposals submitted must be in any of the following file formats:

- PDF
- PPT and PPTX
- XLS and XLSX (Excel) - **Only where required**

## 12 DEADLINE FOR SUBMISSION

Proposals shall submitted at the **email address** mentioned above no later than the closing date of **05 November 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.

## 13 AWARDING OF TENDERS

13.1 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.

## 14 EVALUATION PROCESS



#### 14.1 Evaluation of proposals

14.2 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.

#### 14.3 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.

### 15 PRICING PROPOSAL

15.1 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.

15.2 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.

15.3 Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.

15.4 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.

15.5 \*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.

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

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

15.8 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.

## **16 VALIDITY PERIOD OF PROPOSAL**

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

## **17 APPOINTMENT OF SERVICE PROVIDER**

17.1 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.

17.2 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.

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

## **18 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 3486-05-11-2021 The Provision for supply of Bulk email System to CSIR**” as the 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.

## **19 MEDIUM OF COMMUNICATION**

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

## **20 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.

## **21 CORRECTNESS OF RESPONSES**

- 21.1 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.
- 21.2 The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

## **22 VERIFICATION OF DOCUMENTS**

- 22.1 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
- 22.2 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.

## **23 SUB-CONTRACTING**

- 23.1 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.
- 23.2 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.

## **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:
- 24.3.1 Joint venture Agreement including split of work signed by both parties;
  - 24.3.2 The original or certified copy of the B-BBEE certificate of the joint venture;
  - 24.3.3 The Tax Clearance Certificate of each joint venture member;
  - 24.3.4 Proof of ownership/shareholder certificates/copies; and
  - 24.3.5 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.

**27 ANNEXURE A DECLARATION BY TENDERER**

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

RFP No: 3486-05-11-2021

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 3486-05-11-2021** 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 .....

## 28 ANNEXURE A: SCORING SHEET

Category	Criteria	Score	Weight
Compatibility 20%	Installation compatible with Linux or virtual appliance	Installation compatible with Linux = 20 Virtual Appliance = 10 Neither = 0	20%
Connectivity 20%	Site-to-site VPN between on prem and cloud smtp	Site-to-site vpn =5 No site-to-site vpn = 0	5%
	Secure REST API (HTTPS)	Secure Rest API = 5 No secure REST API = 0	5%
	Secure SMTP	Secure SMTP = 5 No secure SMTP = 0	5%
	Token-Based authentication (API)	Token-based API authentication = 5 No token-based API authentication = 0	5%
Functionality 25%	Address book with groups / Distribution lists	With address book = 5 No address book = 0	5%
	Templates	Has Templates = 5 No Templates = 0	5%
	Reporting	Has reporting = 5 No Reporting = 0	5%
	Billing metrics to track extra spend	Has billing metrics = 5 No billing metrics = 0	5%
	Burst up to 1 million emails a day	Burst up to 1mill included = 5 No burst included = 0	5%
Availability 30%	Provide proof of the availability of the system for the past 12 months	>/= 99.999% (five nines) = 30 99.99% (four nines) = 20 99.95% = 10 </= 99.9% (three nines) = 0	30%
References 5%	Provide at least five client references with relevant experience on a similar bulk email implementation	5 client references provided = 5 Less than 5 references = 0	5%
Total			100%

**29 ANNEXURE A – SBD1**  
**(To be completed by supplier and submitted with tender)**