

# Request for proposals (RFP) Implementation of SharePoint online at the CSIR

# RFP No. 3451/10/05/2021

Date of Issue	Monday, 26 <sup>th</sup> April 2021		
	12:00 to 13:00 CAT, Friday, 30 <sup>th</sup> April 2021		
Briefing Session	Link  Microsoft Teams meeting  Join on your computer or  Click here to join the meeting		
Enquiries and submission of	Strategic	E-mail: tender@csir.co.za	
proposals	Procurement Unit	L-mail. ichder @csin.co.za	
Closing Date and Time	16h30 CAT, Monday, 10 <sup>th</sup> May 2021 (Late bids will not be accepted)		
CSIR business hours	08h00 – 16h30		

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#### **SECTION A – TECHNICAL INFORMATION**

#### 1 INTRODUCTION

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

#### 2 BACKGROUND

The CSIR requires a Microsoft Partner's services to implement SharePoint at the CSIR.

The CSIR currently users the Micro Focus' Novel Open Workgroup Suite and Microsoft 365 Enterprise Applications and implemented Microsoft Teams as part of a Microsoft 365 E1 trial in 2020. To ensure the continued use of Microsoft Teams, the CSIR subscribed to the Microsoft 365 E3 solution in February 2021. Consequently, the CSIR intends to replace Micro Focus Vibe with Microsoft SharePoint and Micro Focus GroupWise with Microsoft Outlook and Exchange.

For the remainder of the document, SharePoint, Outlook, Teams, Project and M365 E3 refers to the Microsoft SharePoint, Microsoft Outlook/Microsoft Exchange and Microsoft Teams products included in the Microsoft 365 E3 offering, Microsoft Project (both online and on-premises), and Microsoft 365 E3, respectively.

The CSIR has limited Microsoft 365 cloud services capability. Therefore, the CSIR requires a local (based in South African) Microsoft Partner with at least gold or silver competencies for Collaboration and Content, and Security, to implement SharePoint. The project does not include the implementation of Outlook, MS Teams or MS Project per se, but does include any configuration of the aforementioned environments required for seamless integration with the CSIR's SharePoint implementation.

The CSIR has access to Microsoft FastTrack's services and expects the Service Provider to work with and augment the services of Microsoft FastTrack.

#### 3 INVITATION FOR PROPOSAL

- 3.1 The CSIR envisages the implementation of SharePoint to happen in two phases:
  - 3.1.1 Phase 1: Enable the use of SharePoint for the CSIR.
  - 3.1.2 Phase 2: Migrate information from current data sources to and replicate the existing Micro Focus Vibe customisations in SharePoint.
- 3.2 Project location.
  - 3.2.1 The project location is CSIR's main site in Pretoria.
  - 3.2.2 The Service Provider may assume that the CSIR will allow resources to work remotely using MS Teams, provided it does not impact negatively on working together with the ICT Services Team.
  - 3.2.3 If a project resource (CSIR or Service Provider) experiences any disruption or degradation of services, e.g., power failures or internet downtime that impact on delivery, the resource shall plan accordingly where possible and make the necessary arrangements to work at the CSIR's main site in Pretoria.
  - 3.2.4 The CSIR reserves the right to at any time require the Service Provider to work at the CSIR's main site in Pretoria, and to do so for any length of time.
- 3.3 Project equipment.
  - 3.3.1 The Service Provider shall ensure that its resources are fully equipped to carry out their activities on the project.
- 3.4 The design for the CSIR Site's design must provide for the following principles and attributes.
  - 3.4.1 Structured sites, which:
    - Are created to align with the CSIR's organisational structure.
    - Are subject to strict controls.
    - Is allocated most of the storage capacity.
  - 3.4.2 Unstructured sites for ad-hoc teams with creative freedom but with a minimum of storage space.
  - 3.4.3 The CSIR's organisational structure.
    - The structure consists of a maximum of four layers for Divisions (core business) and Support Portfolios. Figure 1 shows the first two levels with level one standing committees and offices.

**HR & Remuneration CSIR Board** Strategic Committee Industry Advisory Panel CEO's Office **Audit & Risk Committee Operational Committee** BUSINESS EXCELLENCE & INTEGRATION SYNAPSE IMPLEMENTATION Research and Development Office **Hosted Programmes** CSIR CHEMICALS, AGRICULTURE, FOOD & HEALTH CSIR MINING, MANUFACTURING, DEFENCE AND SECURITY CSIR NATURAL RESOURCES, ENABLING INFRASTRUCTURE, PUBLIC & PROF SERVICES **Smart Mobility** Smart Places NextGen Enterprises & **HUMAN CAPITAL AND COMMUNICATIONS FINANCES** LEGAL AND BUSINESS ENABLEMENT Management Services Enterprise Risk Management Development and Communications CSIR Estates, Land and Buildings International Convention Centre

Figure 1: Level one and level two structure with the level one standing committees

- The structure includes standing and ad-hoc cross-functional committees or teams at all levels. Depending on the committee's or team's nature, they will be at one of the four levels and generally do not have an organisational structure below them.
- The Support Portfolios structures include cross-cutting services in addition to their operational structure.
- 3.4.4 Ease of access to information.
  - Be able to "browse" to the sites in the organisational hierarchy.
  - Link to centrally provisioned services provided by Support Portfolios.
  - Link to the relevant standing committees.
- 3.4.5 Archiving of sites, but which is still readily accessible from the CSIR online SharePoint instance.
- 3.4.6 Managing access to information by ensuring:
  - Users can only access and use information they have been given access to.
  - Group membership for each organisational level is maintained automatically.
  - Authorised users can easily grant access but only within the limits assigned.

- Users cannot circumvent any rules that the CSIR may choose to implement regarding sharing or access control.
- Preventing the accidental sharing of information.
- 3.4.7 Effective controlling of and reporting on storage capacity usage.
- 3.4.8 The Potential future use of SharePoint for the CSIR Intranet.
- 3.4.9 Templates that already contain critical elements that CSIR can use to provision future sites at all levels and of all types quickly.
- 3.4.10 Metadata that CSIR can, preferably automatically, link to files or sites for records management purposes.
- 3.4.11 Retention policies for information.
- 3.4.12 In chronological order, collating e-mails related to a specific initiative or project in a site or site element.
- 3.4.13 CSIR tenants and non-CSIR tenants' users to upload files to specifically designated folder(s), either through direct upload via the web or using a unique email address associated with the selected folder. Uploads via e-mail preferably requires a return e-mail be sent to the sender confirmation of receipt.
- 3.4.14 Minimising duplication of files.
- 3.4.15 Moving of sites to align with any future organisational changes to the CSIR's structure while maintaining data ownership.
- 3.4.16 Controls required to ensure a managed and stable SharePoint site.
- 3.4.17 Maintaining all standard SharePoint functionality for future enhancements of sites.
- 3.4.18 Not limiting the available options for custom development.

#### Phase 1: Enable the use of SharePoint for the CSIR

- 3.5 The principal objective of Phase 1 is to provide the CSIR with a SharePoint Site that it can use to store and share documents from the launch onward.
- 3.6 The CSIR requires rapid deployment of SharePoint hence:
  - 3.6.1 The Service Provider shall prepare the CSIR SharePoint instance for launch within 44 working days from the agreed start date (Phase 1). The 44 working days apply only to activities under the control of the Service Provider.
  - 3.6.2 The Service Provider shall start no later than one week from the purchase order date.
- 3.7 The Service Provider shall provide a turn-key solution that meets the CSIR's requirements, including but not limited to:

- 3.7.1 Documenting design and functional requirements specifications.
- 3.7.2 Designing the CSIR SharePoint instance in collaboration with the CSIR's ICT Services team.
- 3.7.3 Documenting the as-implemented design, operating manual(s), and any other documentation required for the CSIR to expand on and maintain its SharePoint instance beyond the project.
- 3.7.4 Configuring all aspects of SharePoint.
- 3.7.5 Configuring Teams, Outlook, and any other functionality included in M365 E3 required for the SharePoint instance's designed functionality.
- 3.7.6 Transfer the skills required to implement, support, administer and maintain the CSIR's SharePoint instance to the ICT Services team.
- 3.7.7 Make use of the ICT Services team's resources assigned to the project to accelerate implementation. CSIR resources shall report to the Service Provider for tasks that are assigned to them. Performance management will remain the responsibility of the CSIR and the Service Provider shall report performance issues to the staff member's manager for resolution.

# 3.8 Phase 1 shall consist of at least two stages:

- 3.8.1 Stage 1: The minimum outcomes for Stage 1 shall be the following:
  - The CSIR has approved the:
    - Functional requirement and design specifications provided by the Service Provider and referred 3.1 to in 3.7.
    - Security model for the SharePoint site as provided by the Service Provider.
    - Controls proposed and implemented by the Service Provider.
    - Templates created by the Service Provider for the various site types.

#### The Service Provider has:

- Worked with the CSIR to identify and implement any pre-requisites required to start the SharePoint implementation.
- Assisted the CSIR to configure Azure AD, where required for the functioning of the CSIR SharePoint instance.
- Configured the CSIR's SharePoint instance to meet the CSIR's requirements, including the security model and controls.

- Re-configured the CSIR's Teams instance, including restructuring the various SharePoint sites created by Teams, to comply with the SharePoint design.
- Configured Exchange to function optimally with the SharePoint sites.
- Created the required templates and trained the CSIR ICT team to create templates. The CSIR expects a minimum of 15 templates is required but will cap the number of templates to 30 for the purposes of the project.
- Created the level one and level two SharePoint sites. The CSIR
  expects a minimum of 15 level one and 20 level two sites but will cap
  the number of level one and level two sites to 20 and 30 respectively
  for the purposes of the project.
- Trained the CSIR Data Stewards and ICT team to create the level three and level four SharePoint sites.
- Review and provide input into user instructions and training material developed by the CSIR.

# 3.8.2 Stage 2: The minimum outcomes for Stage 2 shall be the following.

- The CSIR has:
  - Created the level three and level four SharePoint sites.
  - Created the user guides and training material to enable users.
  - Launched the CSIR SharePoint site.
- The Service Provider has:
  - Assisted CSIR resources to create level three and level four SharePoint sites.
  - Made changes to the design and assist the CSIR to change templates to provide for the requirements from level three and level four structures and update the relevant documentation.
  - Reviewed that the complete SharePoint deployment meets the CSIR's requirements, is stable and functional, and complies with the design.
  - Review and provide input into user instructions and training material developed by the CSIR.
  - Assist with communications to users by providing content where required.

# Phase 2: Migrate information from current data sources to and replicate the existing Micro Focus Vibe customisations in SharePoint

- 3.9 The CSIR intends to procure the requisite number of hours from the Service Provider for each of the Phase 2 customisations separately and reserves the right to determine which of the customisations to include in Phase 2.
- 3.10 Depending on the nature of the outcome's work, work may even commence before completion of Phase 1.
- 3.11 The CSIR will limit the Service Providers administrator access to what is essential for each of the customisations, preferring that the Service Provider affects changes to the system through the CSIR resources.
- 3.12 The principal objectives of Phase 2 are:
  - 3.12.1 To assist the CSIR to migrate the information from the data sources to SharePoint as outlined in section 3.13. The data sources include Micro Focus Vibe and Micro Focus network shares.
  - 3.12.2 To provide support to the ICT Services team to support the CSIR's SharePoint instance.
  - 3.12.3 To build the customised functionality in Micro Focus Vibe over into SharePoint.
- 3.13 Enable the ICT Services team and the CSIR data stewards to migrate information from the data sources to SharePoint by:
  - Training and guiding the ICT Services team and the CSIR Data stewards in the use of the SharePoint migration tool. CSIR resources will be responsible for the migration of data.
  - Developing custom solutions where required.
- 3.14 Provide support to the ICT Services team to support the CSIR's SharePoint instance by:
  - Resolving post implementation problems.
  - Changing the design and templates to provide for unforeseen requirements.
  - Training the ICT Team in the routine support, administering and maintenance of the CSIR's SharePoint instance.
  - Reviewing and providing input into user instructions and training material developed by the CSIR.
- 3.15 Build the customised functionality in Micro Focus Vibe over into SharePoint. The following are some of the known instances of customised functionality. The examples are described

in terms of functionality as opposed to the specific Vibe configuration, and the expectation the CSIR has of the Service Provider.

#### 3.15.1 Electronic submission of bids:

- Non-CSIR tenant users will mail their submission in the form of documents attached to an e-mail, to an e-mail address that is unique to the RFP/RFQ.
- Ideally the e-mail with the submission must be stored in a folder, alternatively the files attached to the e-mail must be stored in a folder.
- It may be required to verify whether the files were submitted as a ZIP or other specific file format.
- An acknowledgement of receipt must be sent to the sender of the e-mail.
- The folder must not be accessible for anyone but a selected few until such time as the RFP/RFQ has closed whereafter it can be shared with the relevant people.
- The folder in which the submissions are stored must be part of a larger structure that contains all the other documents related to the procurement, which in turn needs to be accessible to the cross organisational team that is part of the procurement.
- The CSIR will require the Service Provider to set-up and configure the SharePoint site for the electronic receipt and management of bids. The site must include the ability for the CSIR to add pre-configured subsites/folders for each new tender with the minimum amount of effort. The access rights must be limited to the selected authorised users of the subsites/folders.

#### 3.15.2 GroupWise Document Management Archive:

- Consists of a copy of all documents that were in our GroupWise Document Management repositories, and which are stored in Vibe.
- Each document has metadata such as the document number, version number, the GroupWise DMS library name, a title, the creator, the author, and the name of the department the document belongs to. The document number, version number and the GroupWise DMS library name together, forms a unique identifier that must be maintained for referential integrity.
- A document may have more than one file depending on the number of versions. Each version has one file associated with it which is stored

- separately with its own permanent hyperlink.
- The access control list is maintained for each document as at the time of archiving the documents.
- The CSIR Information Services team have access to the metadata to search for documents on behalf of other parties, but do not have access to the associated file.
- It has a customised search screen used to find documents. The screen mimics the find feature in GroupWise Document Management.
- The CSIR will require the Service Provider to:
  - Set-up and configure a SharePoint site, potentially on an on-premise instance of SharePoint (The CSIR is licensed for SharePoint Standard on premise) to house the archive,
  - Migrate the data, including the meta data and access control to the new site, and
  - Develop the custom search screen which should be available through SharePoint online.
  - The services of Micro Focus consulting are available for the extraction of information from Vibe.

#### 3.15.3 Technical Outputs database (TOdB):

- The Oracle Workflow based solution uses a REST interface to store documents attached to a TOdB submission directly into Vibe.
- The TOdB records contains a hyperlink to the document.
- The documents are stored in a separate site and the original author will only have view access to the document via the TOdB interface.
- The CSIR will require the Service Provider to:
  - Set-up and configure a SharePoint site to store the ToDB documents,
  - Assist the CSIR developers to set-up and configure the REST interface between SharePoint and Oracle, and
  - Assist the CSIR developers to store, retrieve and manage access control of document in the ToDB SharePoint site from the Oracle workflow using the REST interface.

#### 3.15.4 Excel-based project portfolio solution:

- The solution makes use of Excel spreadsheet to record and report on a portfolio of projects.
- The solution uses multiple spreadsheets which are linked to each other for information exchange and to files for referencing of information.
- Files reside on Vibe and the network shares.
- Spreadsheets are accessed by multiple parties to update information.
- An investigation is underway to migrate the information to Project in the cloud with linking between the information and the source files that will also be stored in SharePoint.
- The CSIR will require the Service Provider to:
  - Design, set-up and configure a Project Online instance to replace the spreadsheets. There are in the order of 15 projects in the portfolio, which is updated by five people, and would ideally have on-line realtime reporting to stakeholders.
  - The Project Online instance must either cater for storing of records or referencing of records in the CSIR SharePoint instance, or both.
- 3.15.5 "Integration" between project sites (SharePoint sites) of an on-premises Project 2019 server and SharePoint online.
  - Project document are stored in Micro Focus Vibe.
  - Project information is stored in the Project 2019 server and associated project sites in SharePoint.
  - The project workspace in Micro Focus Vibe contains hyperlinks to the project details, project schedule and project site on the Project 2019 server.
  - The project details on the Project 2019 server contains hyperlinks to the project workspace in Microfocus Vibe.
  - The documents must be migrated to SharePoint, but the referencing must be maintained.
  - Preferably the documents should be stored on the Project 2019 server but be accessible through SharePoint online.
  - The CSIR will require the Service Provider to:
    - Design, set-up and configure three instances of Project Online for three departments that can operate independently of each other, for the CSIR to migrate to, or re-create projects in the Project Online instance

- in the future.
- Re-create the Project 2019 site template in Project Online and copy the custom lists to the Project Online instance.
- Reconfigure the Project 2019 instance to store documents.
- Create a site template that allows for the storing of documents such that they are accessible from Project Online and the CSIR's SharePoint instance. The latter without the need for a project Online license.

#### 3.15.6 Central contracts repository.

- Store all versions of contracts in a central repository with the appropriate access control.
- Link supplier contracts to the relevant area on the central procurement site.
- Include an automated business process that provides a mechanism for the initiation of a contract.
- Provide reminders for contract renewal based on customisable parameters.
- Ideally, the total lifecycle of a contract must be managed on the site.
- The CSIR will require the Service Provider to:
  - Set-up and configure a SharePoint site to store and manage the life cycle of contracts. The site must include the ability for the CSIR to add pre-configured subsites/folders for each new contract with the minimum amount of effort.
  - Create an automated process for requesting, authoring, and approving contracts. Final approval shall be done using the Adobe Sign solution.
     The automated process should ideally include the creation of the subsite/folder for the contract.
  - Create an automated process to send reminders and other alerts related to a contract. The alerts and reminders must be customisable per contract.

#### 4 SPECIFICATION

4.1 The bid must include the Microsoft Partner Competency Matrix as per **Table 1**. Microsoft Partner Competency levels will be verified with Microsoft using <a href="https://www.microsoft.com/en-us/solution-providers/home">https://www.microsoft.com/en-us/solution-providers/home</a>. In the event of a discrepancy the level recorded on Microsoft's site will be used.

Table 1: Microsoft Partner Competency Matrix

Area	Competency	Level Gold or Silver
Applications and	4.1.1 Application Development	
Infrastructure	4.1.2 App Integration	
Business Applications	4.1.3 Project and Portfolio	
Modern Workplace and	4.1.4 Collaboration and Content	
Security	4.1.5 Messaging	
	4.1.6 <u>Security</u>	

- 4.2 The bid must include a Skills Transfer Plan to indicate how the Service Provider will transfer skills, e.g., assignment of tasks and mentoring). The CSIR will evaluate the quality of the plan based on its assessment of how effective the skills transfer will be.
  - 4.2.1 The skills transfer plan must address at least the following elements.
    - 4.2.1.1 SharePoint design, covering all aspects of the design including but not limited to design requirements elicitation.
    - 4.2.1.2 SharePoint configuration including but not limited to creating content types and site template configuration and exporting.
    - 4.2.1.3 SharePoint site set-up configuration and customisation.
    - 4.2.1.4 Assigning and controlling access.
    - 4.2.1.5 Site administration and maintenance.

- 4.2.2 CSIR's obligation towards successful skills transfer:
  - 4.2.2.1 CSIR resources to whom skills are to be transferred shall complete the relevant Microsoft courses prior to skills transfer. Should the relevant courses not be available for completion within the available time, refer to point 4.2.2.2.
  - 4.2.2.2 CSIR resources shall undertake the necessary self-study and expend the necessary effort to master the subject matter as indicated required by the Service Provider.
  - 4.2.2.3 CSIR staff shall report to the Service Provider where tasks are assigned as part of skills transfer. Performance management will remain the responsibility of the CSIR and the Service Provider shall report performance issues to the staff member's manager for resolution.
  - 4.2.2.4 CSIR resources working on the project will conform to the Service Provider's working hours and pace and deliver on time as agreed.
- 4.3 The bid must include the declaration as per Table 2 in which the bidder declares that the bidder has the capability and capacity to execute the project.

Table 2: Declaration by the bidder.

Declaration		Response Yes or No
4.3.1	The bidder declares that resources assigned to this project will have the requisite certification in line with the Microsoft Partner Competencies listed in Table 1, for the task being performed.	
4.3.2	The bidder declares that where non-certified resources are assigned to assist certified resources, that the number of certified resources will be adequate to perform the relevant task in a timely manner.	
4.3.3	The bidder declares that the bidder can successfully execute Phase 1.	

Declaration		Response
Decia	ation	Yes or No
4.3.4	The bidder declares that the bidder can successfully execute the data migration and support as specified in sections 3.13 and 3.14.	
4.3.5	The bidder declares that the bidder can successfully execute Phase 1 in maximum of 44 working days from the agreed start date where the 44 workings apply only to activities under the control of the Service Provider.	
4.3.6	The bidder declares that the bidder can deliver the outcomes in section 3.15 of the RFP.	
4.3.7	The bidder declares that the bidder has adequate Micro Focus Vibe skills to migrate information from Vibe to SharePoint.	
4.3.8	The bidder declares that the bidder has successfully executed a migration of information from Micro Focus Vibe to SharePoint.	

#### 5 PRICING SCHEDULE

- 5.1 The bid must include a completed pricing schedule as per **Table 3**, which must be included only in Part 2 of the proposal.
- 5.2 The Service Provider shall make the necessary arrangements with Microsoft to use CSIR's 23 Software Assurance days to subsidise the costs for Phase 1 and then reflect the savings in **Table 3**.
- 5.3 The hourly rates included in **Table 3** are fixed for a period of one (1) year from the start of Phase 1.
- 5.4 The number of hours and the associated costs for Phase 2 are considered estimates which the CSIR will use to arrive at a total cost for purposes of evaluation.
- 5.5 The CSIR will agree the number of hours procured for the support and each of the customisations with the Service Provider before procuring the services from the Service Provider.
- 5.6 The bidders must complete all the cells in the table below.

Table 3: Pricing Schedule.

Description	Cost per Hour	Hours (Estimate)	Cost (Incl. VAT)
Phase 1			
Completion of Phase 1 as defined in section 3. N/A N/A			R
Maximum savings by using the CSIR's 23 Software Assurance days		N/A	R
Phase 2			
SharePoint support, including supporting data migrations as outlined in section	R		
SharePoint Support	R	1300	R

Description	Cost per Hour	Hours (Estimate)	Cost (Incl. VAT)
SharePoint customisations	R	160	R
Custom development	R	80	R
Electronic submission of bids			R
SharePoint customisations	R		R
Custom development	R		R
GroupWise Document Management Archive			R
SharePoint customisations	R		R
Custom development	R		R
Technical Outputs database (TOdB)			R
SharePoint customisations	R		R
Custom development	R		R
Excel-based project portfolio solution			R
SharePoint customisations	R		R
Custom development	R		R
Project server set-up, configuration, and customisation	R		R

Description	Cost per Hour	Hours (Estimate)	Cost (Incl. VAT)
Power BI Reporting	R		R
"Integration" between Project 2019 project sites (SharePoint sites) and ShareP	oint online.		R
SharePoint customisations	R		R
Custom development	R		R
Project server set-up, configuration, and customisation	R		R
Power BI Reporting	R		R
Central contracts repository.			R
SharePoint customisations	R		R
Custom development	R		R
Phase 1 & Phase 2 Total			R

# **6 FUNCTIONAL EVALUATION CRITERIA**

- 6.1 The evaluation of the functional/technical detail of the proposal will be based on the criteria in Table 4.
- 6.2 The minimum qualification score for functionality is 75.

Table 4: Evaluation criteria and scoring matrix

Category	Criteria	Score	Weight
Microsoft	Collaboration and Content - Gold or Silver	Gold = 15	15%
Partnership	Competency	Silver = 12	
Competency	Security - Gold or Silver Competency	Gold = 15	15%
	Security - Gold of Silver Competency	Silver = 12	
	App Integration - Gold or Silver Competency	Gold = 14	14%
	App integration - Gold of Silver Competency	Silver = 11	
	Messaging - Gold or Silver Competency	Gold = 13	13%
	iviessaging - Gold of Sliver Competency	Silver = 10	
	Project and Portfolio - Gold or Silver	Gold = 12	12%
	Competency	Silver = 9	
	Application Development - Gold or Silver	Gold = 11	11%
	Competency	Silver = 8	
Skills Trasher	SharePoint design	Adequate = 2	2%
Plan	_	Inadequate = 1	
		Not provided =0	
	SharePoint configuration	Adequate = 2	2%
		Inadequate = 1	
		Not provided =0	
	SharePoint site set-up configuration and	Adequate = 2	2%
	customisation	Inadequate = 1	
		Not provided =0	
	Assigning and controlling access	Adequate = 2	2%
		Inadequate = 1	
		Not provided =0	
	Site administration and maintenance	Adequate = 2	2%
		Inadequate = 1	
		Not provided =0	
Declaration	The bidder declares that the bidder can deliver	Yes = 5	5%
	the outcomes in section 3.15.	No = 0	
	The bidder declares that the bidder has	Yes = 2	2%
	adequate Micro Focus Vibe skills to migrate	No = 0	
	information from Vibe to SharePoint.		
	The bidder declares that the bidder has	Yes = 3	3%
	successfully executed a migration of	No = 0	
	information from Micro Focus Vibe to		
	SharePoint.		

#### 7 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- 7.1 Failure to submit a complete bid as detailed in section 4 (Specification).
- 7.2 If the bidder does not have a Silver or Gold Microsoft Partnership Collaboration and Content Competency.
- 7.3 If the bidder does not have a **Silver or Gold Microsoft Partnership Security Competency**.
- 7.4 If the bidder has not declared in Table 2 that:
  - 7.4.1 Resources assigned to this project will have the requisite certification in line with the Microsoft Partner Competencies listed in Table 1, for the task being performed.
  - 7.4.2 Where non-certified resources are assigned to assist certified resources, that the number of certified resources will be adequate to perform the relevant task in a timely manner.
  - 7.4.3 The bidder can successfully execute Phase 1.
  - 7.4.4 The bidder can successfully execute the data migration and support as specified in sections 3.11 and 3.12.
  - 7.4.5 The bidder can successfully execute Phase 1 in the allotted maximum of 44 working days.
- 7.5 Failure to submit the pricing schedule as per **Table 3**, section 0 (Pricing Schedule).
- 7.6 Submission after the deadline.
- 7.7 Proposals are submitted at an incorrect location. (Proposals to be submitted electronically to tender@csir.co.za).
- 7.8 If the bidder is restricted by National Treasury.

# 8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

Before any negotiations will start with the bidder with the highest scoring points, the CSIRwill require from the bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: <a href="https://www.csd.gov.za">www.csd.gov.za</a>;
- provide the CSIR with 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**

#### 9 PROCEDURE FOR SUBMISSION OF PROPOSALS

- a) All proposals must be submitted electronically to <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
- Respondents must use the RFP number as the subject reference number when submitting their bids.
- c) The e-mail and file sizes should not exceed a total of 30MB per e-mail.
- d) The naming/labelling syntax of files or documents must be short and simple (e.g., Product Catalogues).
- e) All documents submitted electronically via e-mail must be clear and visible.
- f) 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 program, as currently envisaged, incorporates the following key dates:

Issue of tender documents	Monday, 26 <sup>th</sup> April 2021		
Briefing Session	12:00 to 13:00 CAT, Friday, 30 <sup>th</sup> April 2021		
	Link Microsoft Teams meeting		
		Join on your computer or mobile app	
		Click here to join the meeting	
Closing/submission Date	16:30 CAT, Monday, 10 <sup>th</sup> May 2021		
Estimate appointment date of successful	ful Monday, 17 <sup>th</sup> May 2021		
bidder			

#### 11 SUBMISSION OF PROPOSALS

- 11.1 All proposals shall be submitted electronically to **tender@csir.co.za**. No late proposals will be accepted.
- 11.2 Responses submitted by Bidders must be signed by a duly authorised individual.
- 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: RFP No.: 3451/10/05/2021

- Table 1: Microsoft Partner Competency Matrix.
- Table 2: Declaration by the bidder.
- Skills Transfer Plan

PART 2: Pricing Proposal (Annexure B): B-BBEE and other Mandatory Documentation

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- Declaration by Bidder
- Pricing proposal
- Annexure A: SBD 1 Document
- Annexure B: Non-Disclosure Agreement
- 11.5 The CSIR will award the contract to qualified bidder(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price 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 be submitted at the **email address** mentioned above no later than the closing date of *Monday, 10th May 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 and the CSIR's tender website. No regret letters will be sent out.

#### 14 EVALUATION PROCESS

#### 14.1 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 bidders.

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.

#### 14.2 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.

#### 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 (incl. VAT).
- 15.3 Price should include additional cost elements such as freight, insurance, travel cost until acceptance, duty where applicable.
- 15.4 Only firm prices\* will be accepted during the contract 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.
- 15.5 Payment will be according to the CSIR Payment Terms and Conditions.

#### 16 VALIDITY PERIOD OF PROPOSAL

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

#### 17 APPOINTMENT OF SERVICE PROVIDER

- 17.1 The contract will be awarded to the bidder who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 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 e-Tenders portal and CSIR websites 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 3451/10/05/2021 – The implementation of SharePoint online at the 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

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

#### 21 CORRECTNESS OF RESPONSES

- 21.1 The bidder must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.
- 21.2 The bidder accepts that any mistakes regarding prices and calculations will be at their own risk.

#### 22 VERIFICATION OF DOCUMENTS

- 22.1 Bidders 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 bidder will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.
- 23.2 A bidder awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.

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#### 25 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

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

#### **26 TRAVEL EXPENSES**

- 26.1 All travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imbursements, must be in line with the CSIR's travel policy. The following will apply:
  - 26.1.1 Only economy class tickets will be used.
  - 26.1.2 A maximum of R1400 per night for accommodation, dinner, breakfast and parking will be allowed.
  - 26.1.3 No car rentals of more than a Group B will be accommodated.

#### 27 ADDITIONAL TERMS AND CONDITIONS

- 27.1 A bidder shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.
- 27.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 27.3 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.
- 27.4 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.
- 27.5 Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

#### 28 CSIR RESERVES THE RIGHT TO

- 28.1 Extend the closing date;
- 28.2 Verify any information contained in a proposal;
- 28.3 Request documentary proof regarding any tendering issue;
- 28.4 Give preference to locally manufactured goods;
- 28.5 Appoint one or more Service Providers, separately or jointly (whether or not they submitted a joint proposal);
- 28.6 Award this RFP as a whole or in part;
- 28.7 Cancel or withdraw this RFP as a whole or in part.
- 28.8 Continue with the same supplier for phase 2. However, Phase 2 will be dependent on budget availability.

#### 29 DISCLAIMER

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

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#### 30 DECLARATION BY BIDDER

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

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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 bidder 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)	
( ,	WITNESSES
CAPACITY	1
SIGNATURE	2
NAME OF FIRM	DATE:
DATE	

# **RETURNABLE DOCUMENTS**

Failure to provide all Mandatory Returnable Documents at the closing date and time of this RFQ <u>will/may</u> result in a Respondent's disqualification. Bidders are therefore urged to ensure that all these documents are returned with their RFQ.

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

RETURNABLE DOCUMENTS –		
PART A: TECHNICAL RETURNABLES		
Electronic File 1.		
Description		ıded
		No
Completed Table 5: Microsoft Partner Competency Matrix.		
Skills Transfer Plan.		
Completed Table 6: Declaration by the bidder.		
Bidder have a Silver or Gold Microsoft Partnership Collaboration and Content Competency.		
Bidder have a Silver or Gold Microsoft Partnership Security Competency.		
Completed and signed Declaration by Bidder Form.		
Completed and signed Non-Disclosure Agreement Form.		
PART B: PRICING PROPOSAL		
Electronic File 2.		
Pricing Proposal - Completed pricing schedule as per Table 3		
Certified copy of valid B-BBEE Certificate or sworn affidavit.		
Completed SBD1 Form		
Recent audited financial statement		
Any other pricing information the bidder wishes to share as part of the pricing submission.		
This information must not contain any technical information.		

# 31 Annexure A: SBD 1 Form

Complete in full and sign the SBD1 Form.

# 32 Annexure B: Non-Disclosure Agreement

Complete in full and sign the Non-Disclosure Agreement