

Request for Proposals (RFP)

**The Provision of Cloud-based Payroll Solution,
Implementation thereof and Payroll Support Services
to the CSIR for a period of Five (5) Years.**

RFP No. 3594/09/10/2023

Date of Issue	Tuesday, 19 September 2023	
Enquiries	Strategic Procurement Unit	E-mail: tender@csir.co.za
	Please use RFP No and RFP Description as subject reference.	
Last date for submission of enquiries/clarifications	Friday, 22 September 2023 @ 16h30	
Electronic Submission	tender@csir.co.za (If a tender submission exceeds 25MB multiple emails can be sent.)	
Category	Payroll Services	
Closing Date and Time for bid submissions	Monday, 09 October 2023 @ 16h30	
Bid validity Date	120 calendar days from the closing date of the RFP	

TABLE OF CONTENTS

SECTION A	5
GENERAL RFP TERMS AND CONDITIONS	5
1 INTRODUCTION	5
2 SUBMISSION OF PROPOSALS	5
3 COUNTER CONDITIONS	6
4 FRONTING	6
5 PRICING PROPOSAL	7
6 APPOINTMENT OF SERVICE PROVIDER	7
7 SERVICE LEVEL AGREEMENT	7
8 ENQUIRIES AND CONTACT WITH THE CSIR	8
9 MEDIUM OF COMMUNICATION	8
10 CORRECTNESS OF RESPONSES	8
11 VERIFICATION OF DOCUMENTS	8
12 RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL	8
13 ADDITIONAL TERMS AND CONDITIONS	9
14 SPECIAL CONDITIONS	9
15 CONFLICT OF INTEREST, CORRUPTION, AND FRAUD	10
16 MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT	11
17 PREPARATION COSTS AND LIMITATION OF LIABILITY	11
18 INDEMNITY	12
19 PRECEDENCE	12
20 TAX COMPLIANCE	12
21 TENDER DEFAULTERS AND RESTRICTED SUPPLIERS	13
22 GOVERNING LAW	13
23 CONFIDENTIALITY	13
24 AVAILABILITY OF FUNDS	14
25 PERSONAL INFORMATION	14
26 DISCLAIMER	15
SECTION B	16
EVALUATION METHODOLOGY	16
27 TERMS OF REFERENCE	16
28 EVALUATION CRITERIA	16

29	OBJECTIVE CRITERIA	18
30	NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION	19

LIST OF ANNEXURES

- Annexure A – Standard Bidding Document (SBD) 1 Form
- Annexure B – Technical Specification
- Annexure C – Technical Evaluation Matrix/Rubrics
- Annexure D – Pricing Schedule
- Annexure E – Proposal Form and List of Returnable Documents
- Annexure F – Certificate of Acquaintance with RFP
- Annexure G – Preference Point Award Form
- Annexure H – Standard Bidding Document (SBD) 4 Form
- Annexure I – RFP Declaration and Breach of Law Form
- Annexure J – Mutual Non-Disclosure Agreement
- Annexure K – Draft Supplier Agreement

SECTION A

GENERAL RFP TERMS AND CONDITIONS

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, the 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 SUBMISSION OF PROPOSALS

- 2.1 All proposals are to be submitted electronically to tender@csir.co.za. No late proposals will be accepted.
- 2.2 All proposals will only be considered if received by the CSIR before the closing date and time (*as indicated on the cover page*).
- 2.3 All proposal submissions are to be clearly subject-referenced with the **RFP number and RFP Description**. Proposals must consist of two parts, each of which must be sent in separate emails with the following subject:
- PART 1: Technical Proposal (Please indicate the RFP Number on each File/folder)**
- PART 2: Pricing Proposal, Specific Goals claim documentation: RFP No.: (Please indicate the RFP Number on each File/folder)**
- 2.4 Proposals submitted must be signed by a person or persons duly authorised.
- 2.5 Proposals submitted at incorrect location and/or address, will not be accepted for consideration.
- 2.6 Proposals received after the closing date and time at the address indicated in the bid documents will not be accepted for consideration.
- 2.7 All dates and times in this bid are South African Standard Time.
- 2.8 Any time or date in this bid is subject to change at the CSIR's discretion. The establishment of a time or date in this bid does not create an obligation on the part of the CSIR to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if the CSIR extends the deadline for bid

submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

- 2.9** Documents submitted via cloud solutions such as WeTransfer, Google Drive, Dropbox, etc., will not be considered.
- 2.10** The naming/labelling syntax of files or documents must be short and simple.
- 2.11** The CSIR will award the contract to a qualified bidder whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price, specific goals, and if there is a risk that needs to be mitigated then objective criteria will be applied.

3 COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the RFP Conditions or setting of counter conditions by Bidders or qualifying any RFP Conditions will result in the invalidation of such bids.

4 FRONTING

- 4.1** Government supports the spirit of broad based black economic empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent, and legally compliant manner. Against this background, the Government condemns any form of fronting.
- 4.2** The Government, in ensuring that Bidders conduct themselves in an honest manner will, as part of the RFP evaluation processes, conduct, or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry/investigation, the onus will be on the Bidder/contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from the date of notification may invalidate the bid/contract and may also result in the restriction of the Bidder/contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies the CSIR may have against the Bidder/contractor concerned.

5 PRICING PROPOSAL

- 5.1** Pricing must be provided in South African Rand (including all applicable taxes less all unconditional discounts, the discounts must be reflected on the pricing schedule).
- 5.2** Prices that are subject to escalation and rate of exchange fluctuations are to be clearly indicated, with the currency and Rate of Exchange used in the quotation must be clearly indicated.
- 5.3** CSIR desires for pricing to be firm/valid for each twelve (12) month period of the contract.
- 5.4** Provide costing for the provision of a cloud-based payroll solution, implementation thereof and payroll support services to the CSIR.
- 5.5** Pricing should be inclusive of all cost levers and quoted Excluding and Including VAT, where a discount is given, it should be reflected.
- 5.6** Payment will be according to the [CSIR Payment Terms and Conditions](#).
- 5.7** Please provide detailed pricing using a Pricing Schedule outlined under **Annexure D. Pricing must strictly be in accordance with the Pricing Schedule.**

6 APPOINTMENT OF SERVICE PROVIDER

- 6.1** The contract will be awarded to the successful bidder who scores the highest total number of preference points during the evaluation process.
- 6.2** The CSIR will appoint one (1) service provider for the provision of cloud-based payroll solution, the implementation thereof and payroll support services to the CSIR for the duration of the contract period.
- 6.3** CSIR will use the most reliable and most cost-effective service provider.
- 6.4** 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 an agreement, CSIR reserves the right to appoint an alternative supplier.
- 6.5** Awarding of contracts will be published on the same platform where the bid was published, and no regret letters will be sent to unsuccessful bidders.

7 SERVICE LEVEL AGREEMENT

- 7.1** Upon award, the CSIR and the successful bidder will conclude an agreement in line with the applicable form of contract (i.e. **Annexure K: [Draft Supplier Agreement](#)**) regulating the specific terms and conditions applicable to the services being procured by the CSIR.

7.2 The CSIR reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable to the CSIR or pose a risk to the organisation.

8 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFP shall be submitted in writing to CSIR to the email and format outlined in the table on the cover page of this RFP document.

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.

9 MEDIUM OF COMMUNICATION

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

10 CORRECTNESS OF RESPONSES

10.1 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.

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

11 VERIFICATION OF DOCUMENTS

11.1 Bidders should check the numbers of the pages to satisfy themselves that none is missing or duplicated. No liability will be accepted by the CSIR regarding anything arising from the fact that pages are missing or duplicated.

11.2 Pricing schedule and specific goals credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

12 RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors, and other representatives), its sub-contractors (if any), and

personnel of its sub-contractors comply with all terms and conditions of this bid. In the event that the CSIR allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and the CSIR will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.

13 ADDITIONAL TERMS AND CONDITIONS

- 13.1** 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.
- 13.2** Copies of any affiliations, memberships, and/or accreditations that support your submission must be included in the tender.
- 13.3** In case of proposal/s from a joint venture, the following must be submitted together with the proposal/s:
- A joint venture agreement signed by both parties clearly indicating the lead partner, including the split of work;
 - The Tax Compliance Status (TCS) or CSD Report of each joint venture partner;
 - Proof of ownership/shareholder certificates/copies; and
 - Company registration certificate/s.
- 13.4** 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.
- 13.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

14 SPECIAL CONDITIONS

The CSIR reserves the right to:

- 14.1** Extend the closing date of this RFP;
- 14.2** Correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process;
- 14.3** Verify any information contained in the bidder's submission;
- 14.4** Request documentary proof regarding the bidder's submission;

- 14.5 Carry out site inspections, product evaluations, or explanatory meetings in order to verify the nature and quality of the product/service offered by the bidder(s) or verify any information whether before or after the adjudication of this RFP;
- 14.6 Award this bid to a bidder that did not score the highest total number of points, only in accordance with Section 2(1)(f) of the PPPFA (Act 5 of 2000);
- 14.7 Request audited financial statements or other documents for the purpose of a due diligence exercise to determine if the bidder will be able to execute the contract;
- 14.8 Award this RFP as a whole or in part;
- 14.9 Cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated, and/or after the preferred bidder(s) have been notified of their status as such;
- 14.10 Post tender, negotiate on any elements of the bid, including but not limited to technical, transformation, price, and contractual terms and conditions;
- 14.11 Not to award a contract to a bidder who is associated with a security breach that materially adversely affects other entities or if any directors or officers of a bidder are formally accused of fraudulent or illegal conduct which, would harm the CSIR's reputation by its continued association with the bidder.

15 CONFLICT OF INTEREST, CORRUPTION, AND FRAUD

- 15.1 The CSIR reserves its right to disqualify any bidder who either itself or any of whose members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of CSIR or any other government organ or entity and whether from the Republic of South Africa or otherwise ("Government Entity")
 - a. engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid;
 - b. seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor, or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;

- c. makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors, or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- d. accepts anything of value or an inducement that would or may provide financial gain, advantage, or benefit in relation to procurement or services provided or to be provided to a Government Entity;
- e. pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift, or any other consideration, that is contingent upon or results from, the award of any tender, contract, right, or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
- f. has in the past engaged in any matter referred to above; or
- g. has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member, or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.

16 MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

16.1 The bidder should note that the terms of its Tender will be incorporated in the proposed contract by reference and that the CSIR relies upon the bidder's Tender as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder.

16.2 It follows therefore that misrepresentations in a Tender may give rise to service termination and a claim by the CSIR against the bidder notwithstanding the conclusion of the Service Level Agreement between the CSIR and the bidder for the provision of the Service in question. In the event of a conflict between the bidder's proposal and the Service Level Agreement concluded between the parties, the Service Level Agreement will prevail.

17 PREPARATION COSTS AND LIMITATION OF LIABILITY

The Bidder will bear all its costs in preparing, submitting, and presenting any response or Tender to this bid and all other costs incurred by it throughout the bid process. Furthermore, no statement in this bid will be construed as placing the CSIR, its employees,

or agents under any obligation whatsoever, including in respect of costs, expenses, or losses incurred by the Bidder(s) in the preparation of their response to this bid.

A Bidder participates in this bid process entirely at its own risk and cost. The CSIR shall not be liable to compensate a Bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the Bidder's participation in this Bid process.

18 INDEMNITY

If a Bidder breaches the conditions of this bid and, as a result of that breach, the CSIR incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process, and/or enforcement of intellectual property rights or confidentiality obligations), then the Bidder indemnifies and holds the CSIR harmless from any and all such costs which the CSIR may incur and for any damages or losses the CSIR may suffer.

19 PRECEDENCE

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

20 TAX COMPLIANCE

No tender shall be awarded to a bidder who is not tax compliant. If a recommended bidder is not tax compliant, the bidder will be notified in writing of their non-compliant status and the bidder will be requested to submit written proof from SARS of their tax compliant status or proof that they have made an arrangement to meet their outstanding tax obligations within seven (7) working days. Should they fail to do so CSIR will reject their bid.

The CSIR reserves the right to withdraw an award made, or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was in fact not tax compliant at the time of the award or has submitted a fraudulent Tax Clearance Certificate to the CSIR, or whose verification against the Central Supplier Database (CSD) proves non-compliant. The CSIR further reserves the right to cancel a contract with a

successful bidder in the event that such bidder does not remain tax compliant for the full term of the contract.

21 TENDER DEFAULTERS AND RESTRICTED SUPPLIERS

No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appear on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. The CSIR reserves the right to withdraw an award, or cancel a contract concluded with a Bidder should it be established, at any time, that a bidder has been blacklisted with National Treasury by another government institution.

22 GOVERNING LAW

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this bid, the bid itself and all processes associated with the bid.

23 CONFIDENTIALITY

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's tender(s) will be disclosed by any bidder or other person not officially involved with the CSIR's examination and evaluation of a Tender.

No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a Tender. This bid and any other documents supplied by the CSIR remain proprietary to the CSIR and must be promptly returned to the CSIR upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived there from.

Throughout this bid process and thereafter, bidder(s) must secure the CSIR's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this bid relates; or (ii) the process which follows this bid. Failure to

adhere to this requirement may result in disqualification from the bid process and civil action.

24 AVAILABILITY OF FUNDS

Should funds no longer be available to pay for the execution of the responsibilities of this bid, the CSIR may terminate the Agreement at its own discretion or temporarily suspend all or part of the services by notice to the successful bidder who shall immediately make arrangements to stop the performance of the services and minimize further expenditure: Provided that the successful bidder shall thereupon be entitled to payment in full for the services delivered, up to the date of cancellation or suspension.

25 PERSONAL INFORMATION

- 25.1** Each Party consents to the other Party holding and processing “personal information” (as defined in the POPI Act) relating to it for legal, personnel, administrative and management purposes (including, if applicable, any “special personal information” relating to him/her, as defined in the POPI Act). Notwithstanding the generality of the aforesaid, each Party hereby undertakes to comply with all relevant provisions of the POPI Act and any other applicable data protection laws. The bidder further agrees to comply with all CSIR’s reasonable internal governance requirements pertaining to data protection.
- 25.2** Each Party consents to the other Party making such information available to those who provide products or services to such parties (such as advisers, regulatory authorities, governmental or quasi-governmental organisations and potential purchasers of such Party or any part of their business).
- 25.3** While performing any activity where a Party is handling personal information as a “responsible party” (as defined in the POPI Act), each Party undertakes that it will process the personal information strictly in accordance with the terms of the POPI Act, this Contract, and the other Party’s instructions from time to time, and take appropriate operational measures to safeguard the data against any unauthorised access.
- 25.4** Each Party acknowledges that in the course of conducting business with each other, each Party intends to maintain and process personal information about the other Party in an internal database. By signing this Contract, each Party consents to the maintenance and processing of such personal information.

25.5 Where relevant, the bidder shall procure that all of its personnel, agents, representatives, contractors, sub-contractors and mandataries shall comply with the provisions of this clause 25 (Personal Information). The CSIR shall be entitled on reasonable notice to conduct an inspection or audit bidders' compliance with the requisite POPI Act safeguards.

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, 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 regards to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the bidder or any other party in connection therewith.

SECTION B

EVALUATION METHODOLOGY

27 TERMS OF REFERENCE

This RFP is for The Provision of Cloud-based Payroll Solution, Implementation thereof and Payroll Support Services to the CSIR for a period of Five (5) Years. The service offering must include all requirements as set out in **Annexure B**.

28 EVALUATION CRITERIA

The CSIR has set minimum standards that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

Elimination Criteria (Phase 1)	Technical Evaluation Criteria (Phase 2)	Price and Preference Points Evaluation (Phase 3)	Objective Criteria
<p>Only bidders that comply with ALL the criteria set on paragraph 28.1 on Phase 1 below will proceed to Technical / Functional Evaluation (Phase 2).</p>	<p>Bidder(s) are required to achieve a predetermined minimum point of 60% threshold on each of the individual criteria, and a predetermined minimum threshold of 80% on the overall 100%. Only bidder(s) who meet and/or exceeded the minimum threshold points on Phase 2 below will proceed to Price and Preference Points Evaluation. (Phase 3)</p>	<p>Bidder(s) will be evaluated out of 100 points, 80 points for Price and 20 points for Preference Points.</p>	<p>The CSIR reserves the right to award this tender to a bidder that did not score the highest total number of points in accordance with Section (2) (1) (f) of the PPPFA (Act 5 of 2000).</p>

28.1 Elimination Criteria (Phase 1)

Proposals will be eliminated under the following conditions:

- Bidders that submit late bids will not be considered.
- Bidders that submit to the incorrect location or email address will not be considered (Only electronic submission to tender@csir.co.za would be considered).
- Bidders that are listed on the NT database of restricted suppliers will not be considered.
- Bidder that are registered on the NT Register of Tender Defaulters will not be considered.

- Bidder that did not submit any one of the mandatory returnable documents as listed in **Annexure E: Proposal Form and List of Returnable Documents (Mandatory Returnable Documents Table)**.

Only bidders that comply with ALL the elimination criteria (Phase 1) will qualify to be evaluated on the Technical/Functional Evaluation (Phase 2).

28.2 Technical Evaluation Criteria (Phase 2)

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

No	ELEMENT	WEIGHT
1	Company Experience	10
2	References	10
3	Human resource requirements	20
4	Infrastructure and technology	30
5	Track Record and Experience	30
TOTAL (%)		100

Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **80%** and less than **60%** on each of the individual criteria will be eliminated from further evaluation on Price and Preference Points Evaluation.

Refer to **Annexure C (Technical Evaluation Matrix)** for the scoring ranges / rubrics that will be used to evaluate functionality.

28.3 Price and Preference Points Evaluation (Phase 3)

Only Bidders that have met minimum thresholds on Technical / Functional Evaluation will be evaluated for price and preference points. Price and Preference Points will be evaluated as per **Annexure G: Preference Points Award Form**.

29 OBJECTIVE CRITERIA

The CSIR reserves the right to award this tender to a bidder that did not score the highest total number of points in accordance with Section (2) (1) (f) of the PPPFA (Act 5 of 2000)", under the following conditions:

- Three (3) latest Audited Annual Financial Statements (Only latest Audited Annual Financial Statements for period between year 2020 and year 2023 would be considered). The following will be reviewed in the latest AFS to assess the financial sustainability of the Bidder:
 - Current Ratio (must be greater than 1).
 - The value of the proposed service for year 1 of the bid in relation to the total turnover/income/revenue of the latest financial year (ratio must be less than 1).
 - Debt-to-equity (D/E) ratio (must not be greater than 2).
- The directors or officers of the bidder must not be formally charged of fraudulent or illegal conduct that could harm the CSIR's reputation by associating with the bidder.

30 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

Respondents are required to self-register on National Treasury's Central Supplier Database (CSD) which has been established to centrally administer supplier information for all organs of state and facilitate the verification of certain key supplier information. Business may not be awarded to a Respondent who has failed to register on the CSD. Only foreign suppliers with no local registered entity need not register on the CSD. In order to enable the CSIR to verify information on the CSD, Respondents are required to provide the unique registration reference number.

Before any negotiations will start with the recommended bidder it will be required from the recommended 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 with their CSD registration number.

Annexure A

Standard Bidding Document (SBD) 1

PART A: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CSIR					
BID NUMBER:	3594/09/10/2023	CLOSING DATE:	09 October 2023	CLOSING TIME:	16h30
DESCRIPTION	The Provision of Payroll Solution, Implementation thereof and Payroll Support services to the CSIR for a period of Five (5) years				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
The CSIR requires that all tender submissions be submitted electronically to tender@csir.co.za . Should tender file size exceed 25MB, bidders submit tender in multiple emails. Use the tender number 3594/09/10/2023 and description of the tender as the subject on your email.					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON		CONTACT PERSON			
TELEPHONE NUMBER		TELEPHONE NUMBER			
FACSIMILE NUMBER		FACSIMILE NUMBER			
E-MAIL ADDRESS	tender@csir.co.za	E-MAIL ADDRESS		tender@csir.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					

VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
1 ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		2 ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO DOES THE ENTITY HAVE PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> NO IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

PART B: TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:

(Proof of authority must be submitted e.g. company resolution)

DATE:

Annexure B

Technical Specification for The Provision of a Cloud-based Payroll Solution, Implementation thereof and Payroll Support services to the CSIR for a period of Five (5) Years.

RFP No. 3594/09/10/2023

1. INTRODUCTION

The Council for Scientific and Industrial Research (CSIR) requires a payroll solution to streamline and automate the process of calculating, managing, and distributing employee compensation, including, salaries, bonuses, increases, overtime payments, multiple payroll runs per month and deductions. The payroll system should be designed to ensure accurate and timely payroll processing while complying with relevant legal and regulatory requirements.

2. INVITATION FOR PROPOSAL

Proposals are hereby invited for the provision of a cloud-based payroll solution, implementation thereof and payroll support services to the CSIR for a period of five (5) years.

The purpose of the Request for Proposal (RFP) is to obtain capability, pricing and general information on the business of potential Contractors for the CSIR to determine the Contractors most capable of providing the service.

This RFP document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required by the CSIR.

This RFP does not constitute an offer to do business with the CSIR, but merely serves as an invitation to bidder(s) to facilitate a requirements-based decision process.

Responses to this Request for Proposal (RFP) (hereinafter referred to as a Bid or a Proposal) are requested from suitably qualified entities (hereinafter referred to as a Respondent or

Bidder) for the provision of a cloud-based payroll solution, implementation thereof and payroll support services to the CSIR for a period five (5) years.

The bidder who scores the highest number of preference points following the CSIR approved evaluation process based on the evaluation criteria set out in section 28 (evaluation criteria), will be appointed to provide a cloud-based payroll solution, implementation thereof and payroll support services for a period of five (5) years.

3. PROPOSAL REQUIREMENTS

All proposals are to be submitted in a format specified in this enquiry. However, bidders are welcome to submit additional / alternative proposals over and above the originally specified format.

3.1. Technical Proposal

The following must be submitted as part of the **technical** proposal:

- a. Company profile.
- b. Detailed Technical Proposal
- c. Client Reference
- d. Demonstration of proposed Solution

3.2. Financial Proposal:

The following must be submitted as part of the **financial** proposal:

- a. Cover Letter.
- b. Completed Pricing Schedule (Annexure D).
- c. CSD registration report (RSA suppliers only).
- d. Audited Financial Statements not older than 2 years.

3.3. Mandatory Qualifying Criteria

Mandatory qualifying criteria must be met, or your bid will not be eligible for evaluation.

Failure to submit the required documents will lead to disqualification.

- a. Annexure D - Pricing Schedule.

4. DETAILED SPECIFICATION OF THE SCOPE OF WORK

Service providers must submit a bid proposal for the provision of a cloud-based payroll solution, implementation thereof and payroll support services to the CSIR for a period of Five (5) years. The payroll solution provider must have a minimum of ten (10) years' experience implementing payroll solutions and servicing corporate clients. The following minimum requirements must be met:

4.1 Compliance with South African Laws: The payroll solution and implementation partner shall demonstrate a thorough understanding of and compliance with all applicable South African laws, including tax regulations, labor laws, and data protection regulations such as the Protection of Personal Information Act (PoPIA).

4.2 Experience in the South African Market: The implementation partner shall have experience working with South African companies, preferably including state-owned entities. They shall have a solid understanding of the local business environment, regulatory landscape, and specific requirements of state-owned companies. When evaluating company experience for a Joint Venture and sub-contracting, the CSIR will evaluate the partner with the most years of experience.

4.3 Integration Capabilities: The payroll solution and implementation partner shall have the ability to integrate with existing systems and processes within the CSIR, such as Human Resources (HR) systems, timekeeping systems, and financial systems. This ensures seamless data flow and eliminates the need for manual data entry and reconciliation. Ability to Integrate with Oracle PeopleSoft is a key requirement.

4.4 Robust Security Measures: Given the sensitive nature of payroll data, the payroll solution and implementation partner shall have strong security measures in place to protect employee data, including encryption, access controls, regular security audits, and compliance with industry best practices.

4.5 Reporting and Compliance Capabilities: The payroll solution must have comprehensive reporting capabilities to generate accurate and timely reports required for compliance purposes, including tax reporting, Unemployment Insurance Fund (UIF) contributions, and

labor law compliance. The implementation partner shall have expertise in configuring the solution to meet the specific reporting requirements of the CSIR.

4.6 Support and Maintenance: The implementation partner shall offer ongoing support and maintenance services to address any issues or questions that may arise during the implementation and post-implementation phases. They shall have a dedicated support team knowledgeable in South African payroll processes and regulations.

4.7 References and Track Record: References are required from other South African companies or similar organizations to ensure the bidder has successfully implemented payroll solutions and provided satisfactory services.

5. SOLUTION REQUIREMENTS

5.1. Functional Requirements

The service provider shall provide a fully-fledged cloud-based payroll solution that includes the following functional requirements:

- a. **Calculation accuracy:** The payroll solution must be designed to accurately calculate employee salaries, taxes, deductions, and benefits based on the applicable legislative requirements, company policies, and individual employee details. It must help to minimise errors and ensure that employees receive the correct amount of compensation.
- b. **Time and cost efficient:** The solution need to provide automation of various payroll tasks, such as calculating hours worked, applying tax rates, and generating payslips. The payroll solution must save time and reduce administrative burdens. The solution must be able to provide batch processing capabilities. The payroll solution needs to eliminate manual calculations and repetitive data entry, freeing up HR and payroll personnel to focus on other critical responsibilities.
- c. **Compliance with legal and regulatory requirements:** The payroll solution must help ensure compliance with various legal and regulatory obligations related to payroll processing. The payroll solution must comply with all applicable South African laws, including tax regulations as set out by SARS, labor laws, and data protection regulations such as the Protection of Personal Information Act (PoPIA).
- d. **Data management and reporting:** The payroll solution must centralise employee compensation data and provide comprehensive reporting capabilities. The solution must

make provision for and ensure the availability of real-time information. The solution must enable HR and Finance departments to generate standard and custom reports on payroll expenses, tax, employee benefits, and other relevant metrics. The solution must be able to interface reports and information with SARS and other legislative bodies that include but are not limited to the UIF, Compensation for Occupational Injuries and Diseases Act (COIDA) etc. The solution must be able to customize these reports as per the legislated requirements and accommodate any format changes with minimal intervention requirements by the service providers. This data will be used for budgeting, financial analysis, auditing, and strategic decision-making.

- e. **Employee self-service and engagement:** The payroll solution must offer a self-service portal where employees can access their IRP5 documentation, payslips, structure their own salary/compensation packages and other payroll-related information. Such self-service functionality needs to empower employees to manage their personal details, view their compensation history, and make changes to their benefits, to foster transparency and engagement.
- f. **System Security and Segregation of duties:** The solution must offer organization-specific segregation of duty settings through simple security configuration. Systems administrator functionality must be available to the internal CSIR systems teams. The solution needs to produce an audit trail for all changes and updates.
- g. **User Interfaces:** The solution shall provide a friendly, intuitive, and aesthetically pleasing user interface. The solution must provide simple navigation and timeout functionality for periods of inactivity as an added security measure.
- h. **Best Practices:** The solution shall adhere to industry and sector best practice regarding payroll solutions, payroll service offerings and payroll processes (e.g., compliance with the South African Board for People Practices' HR Standards Update – 2017).
- i. **Banking and Payments:** The solution must be able to interface with local South African Banks and produce bank payment files. The solution needs to automatically update bank branch codes. The solutions must be able to handle multiple payment runs including bonus payroll runs.

5.2. Technical Requirements

- a. The system must integrate with the current (Oracle PeopleSoft) and future Enterprise Resource Planning (ERP) general ledger and Human Capital Management solutions.

- b. The solution must have the ability to interface with 3rd party systems such as SARS, UIF, Pension Fund, and other employee benefits.
- c. The solution shall be interoperable by making use of open standards-based integration protocols, frameworks, and best practices to enable seamless integration with current in-use technologies and potential future investments.
- d. The solution must provide for Development and Test environments to ensure no development is done within the production environment, appropriate testing is done before deployment to production and to address segregation of duties concerns.
- e. The Bidder's Information Security and Privacy documentation will be subject to due diligence by CSIR.
- f. The Bidder must confirm the solution is cloud-based, hosted within the borders of South Africa and preferably disclose the locations thereof. If the Bidder makes use of a cloud service provider, the details of the cloud service provider, and if successful, must be prepared to share the hosting agreement with the hosting service provider.
- g. The Bidder must confirm that the failover and backup locations for the solution are within the borders of South Africa or in a country that offers an adequate level of personal information protection as at the sole discretion of the CSIR.
- h. The Bidder must declare the details of their backup regime including the backup interval as well as disaster recovery procedures and ad-hoc restore capability.
- i. The Bidder must describe the authentication management and integration with Azure Active Directory/Microsoft 365 and specify the method used for integration with alternative directory services.
- j. The Bidder must confirm the availability of multifactor authentication for the solution.
- k. The Bidder must describe the available options for data integration, synchronization, and sharing.
- l. The Bidder must specify the types of data export capabilities supported.
- m. The bidder must explain the process for handling CSIR data when the services are discontinued, including data expungement.
- n. The solution must be configurable to work within the business continuity and disaster recovery protocols and approach employed by the CSIR.

5.3. Support Requirements

- a. **Dedicated Support Team:** The implementation partner shall provide a dedicated support team that is readily available to address any technical issues, inquiries, or concerns that may arise during and after the implementation process. This team shall have a solid understanding of the South African payroll landscape and be knowledgeable about the specific requirements of state-owned companies.
- b. **Response Time and Resolution:** The implementation partner shall clearly define the response time for support requests and the maximum time allowed for issue resolution. It is important to ensure that the response and resolution times are reasonable and aligned with the CSIR's needs and urgency. Prompt support is crucial to minimize disruptions to payroll operations.
- c. **Escalation Process:** The Implementation partner shall outline an escalation process for cases where issues are not resolved within the specified timeframes or require higher-level attention. This ensures that critical problems receive appropriate attention and are escalated to higher levels of support or management if necessary.
- d. **Regular Updates and Maintenance:** The implementation partner shall provide regular updates and maintenance to the payroll solution to ensure its smooth operation, security, and compliance with changing regulations. The Implementation methodology must specify the frequency and process for updates, including any scheduled downtime required for maintenance activities.
- e. **Training and Knowledge Transfer:** The implementation partner shall offer formal training sessions (that include relevant training material) and knowledge transfer to the CSIR's payroll and HR teams. This will ensure that the internal staff understands how to effectively use and manage the payroll solution, reducing reliance on external support for routine tasks.
- f. **Data Security and Confidentiality:** The Implementation partner shall include provisions that ensure the proposed solution follows strict data security practices, including measures to protect employee data, maintain confidentiality, and comply with relevant data protection regulations such as the Protection of Personal Information Act (PoPIA). This may involve encryption, access controls, data backups, and regular security audits.

5.4. Bidder's Past Experience

Bidder(s) to complete the information request below and provide minimum of three (3) successful implementations of a cloud-based payroll solution; and provided maintenance and support.

Client's Name and Contact Details	Contract period (Start and end date).	Detail scope of services rendered.	Indicate if payroll solution is hosted in South Africa or a different location.

Note 1:

The detailed scope must reference the supply of the solution, implementation of the solution and support of the solution where applicable per client.

Annexure C

Technical Evaluation Matrix

The Provision of Payroll Solution, Implementation thereof and Payroll Support services to the CSIR for a period of Five (5) Years

RFP No. 3594/09/10/2023

The CSIR will review all proposals based only on evidence submitted as part of the proposals submitted. Provide evidence and describe processes where applicable to assist the CSIR with its evaluation. The final interpretation of evidence and proposed solutions resides with the CSIR, and this interpretation will be used as the basis for evaluation against the requirements in Annexure B and the functional criteria as described in this document.

Bidders shall note that information provided in the submitted proposals will be reflected in the service level agreement that will be signed with the successful service provider.

The bidders will be evaluated according to the functional / technical evaluation criteria in the table below. Bidders must indicate their ability to do the following and to substantiate as required with supporting documentation:

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight %	Reference page in bidder's document	Comments
Technical Evaluation Criteria				
1.	COMPANY EXPERIENCE	10	Clarification on	
1.1	<p>Bidder must submit a complete company profile including information that will describe their service offering. The company profile must indicate the number of years' experience in providing the proposed cloud-based payroll solution, implementation thereof and payroll support services to public sector and/or corporate institutions.</p> <ul style="list-style-type: none"> • No submission or Company profile with less than ten (10) years company experience = 0 points • Company profile with 10 years to less than 12 years' experience = 6 points • Company profile with 12 years to less than 15 years' experience = 8 points • Company profile with 15 years and above experience with completed customer information = 10 points 	10		
2.	REFERENCES	10	Clarification on	
2.1	<p>Bidder must submit a minimum of three (3) contactable relevant reference letters where similar payroll solution services were undertaken. The references must be signed and on the bidder's client's letterhead. These letters must include contract duration, details of services rendered and the client's review of the bidder's service delivery.</p>	10		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight %	Reference page in bidder's document	Comments
	<ul style="list-style-type: none"> • No submission or reference letters submitted are not as per above requirements or less than three (3) reference letter are submitted = 0 points • Three (3) Contactable relevant references meeting all requirements = 6 points. • Four (4) and less than six (6) Contactable relevant reference letters meeting all requirements = 8 points • Six (6) or more contactable relevant reference letters meeting all requirements. = 10 points 			
3.	HUMAN RESOURCE REQUIREMENTS	20	Clarification on	
3.1	<p>The. Bidder must provide CVs/testimonials, or both for the implementation team that confirms that the implementation team has a minimum of five (5) years' experience in the supply, implementation thereof and support of the proposed payroll solution. The CVs/testimonials must have the Bidder's company name as the current employer-</p> <ul style="list-style-type: none"> • No submission or CVs/testimonials submitted with less than five (5) years of experience = 0 points • CVs/testimonials submitted with five (5) years and less than ten (10) years of experience = 6 points • CVs/testimonials submitted with ten (10) years and less than fifteen (15) years of experience = 8 points 	20		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight %	Reference page in bidder's document	Comments
	CVs/testimonials submitted with fifteen (15) years or more years of experience. = 10 points			
4.	INFRASTRUCTURE AND TECHNOLOGY	30		Clarification on
4.1	<p>Bidder must have evidence to demonstrate that their solution is cloud-based, has capability to structure salary package via self-service and is compliant with SARS and other legislative entities requirements (UIF and COIDA). Bidder must provide a PDF/ brochure/ screenshot of the proposed solution.</p> <ul style="list-style-type: none"> No evidence provided, or evidence is provided but does not meet one (1) or more of the requirements. = 0 points Evidence is provided and the solutions is cloud-based, has capability to structure salary package via self-service and is compliant with SARS and other legislative entities requirements = 10 points 	15		
4.2	<p>Bidder must demonstrate that it has an ability to provide local (South Africa) maintenance and support. Evidence provided can include any one of the following: South African footprint, company registration document, utility bill, physical address of the local office, lease agreement or proof of ownership of the property.</p> <ul style="list-style-type: none"> No submission or submission is provided but does not meet the requirements = 0 points 	15		

Main evaluation criteria	Sub criteria <i>All criteria will be scored according to the scoring criteria in this table</i>	Weight %	Reference page in bidder's document	Comments
	Bidder demonstrated that it has local (South) Africa maintenance and support. = 10 points			
5.	TRACK RECORD AND EXPERIENCE	30	Clarification on	
5.1	<p>Bidder must provide evidence of successful implementation of a cloud-based payroll solution that includes maintenance and support. The bidder must complete Annexure B, Clause 5.4. Bidder's Past Experience.</p> <ul style="list-style-type: none"> • No submission or, evidence is provided but does not show successful implementation of a cloud-based payroll solution that includes maintenance and support, or the bidder has less than three (3) successful implementations of a cloud-based payroll solution; and provided maintenance and support = 0 points. • Bidder has three (3) and less than five (5) successful implementations of a cloud-based payroll solution that includes maintenance and support = 6 points • Bidder has five (5) and less than ten (10) successful implementations of a cloud-based payroll solution that includes maintenance and support = 8 point • Bidder has ten (10) or more successful implementations of a cloud-based payroll solution that includes maintenance and support = 10 point 	30		

Proposals with functionality / technical points of less than the **pre-determined minimum overall percentage of 80%** and **less than 60% on each of the individual criterion** will be eliminated from further evaluation Price and preference points.

**Annexure D
Pricing Schedule**

**The Provision of Payroll Solution implementation and Payroll Support services to the CSIR for a period of Five
(5) Years**

RFP No. 3594/09/10/2023

NB. All item line prices must exclude VAT.

Description	Quantity	Rate	Year 1	Year 2	Year 3	Year 4	Year 5	Total
System Implementation								
Licensing fee								
Training Cost (including training manuals)								
Support cost								
Total (Excl. VAT)								
VAT								
Total (Incl. VAT)								
*Settlement Discount %								
*Trade Discount %								

Definition of discounts

- A settlement discount is where a business offers the CSIR a discount when an invoice is paid on time or within 45 days from receipt of statement.
- A trade discount is defined as a type of discount that is cut off the retail or proposal price of an item. The discount is immediately deducted from the proposal price. [OBJ]

Annexure E

Proposal Form and List of Returnable Documents

The Provision of Payroll Solution, Implementation thereof and Payroll Support services to the CSIR for a period of five (5) years

RFP No. 3594/09/10/2023

I/We _____

[name of entity, company, close corporation or partnership] of [full address]

carrying on business trading/operating as

represented by _____ in my capacity
as

being duly authorised thereto by a Resolution of the Board of Directors or Members or Certificate of Partners, dated _____ to enter into, sign execute and complete any documents relating to this proposal and any subsequent Agreement. The following list of persons are hereby authorised to negotiate on behalf of the abovementioned entity, should CSIR decide to enter into Post Tender Negotiations with shortlisted bidder(s).

FULL NAME(S) CAPACITY SIGNATURE

I/We hereby offer to supply the abovementioned Services at the prices quoted in the schedule of prices in accordance with the terms set forth in the documents listed in the accompanying schedule of RFP documents.

I/We agree to be bound by those conditions in CSIR's:

1. General RFP Terms and Conditions; and [CSIR's Purchasing Terms and Conditions](#)

or

Any other standard or special conditions mentioned and/or embodied in this Request for Proposal.

I/We accept that unless CSIR should otherwise decide and so inform me/us in writing of award/intent, this Proposal [and, if any, its covering letter and any subsequent exchange of correspondence], together with CSIR's acceptance thereof shall constitute a binding contract between CSIR and me/us.

I/We further agree that if, after I/we have been notified of the acceptance of my/our Proposal, I/we fail to enter into a formal contract if called upon to do so, or fail to commence the supply of Services within 4 [four] weeks thereafter, CSIR may, without prejudice to any other legal remedy which it may have, recover from me/us any expense to which it may have been put in calling for Proposals afresh and/or having to accept any less favourable Proposal.

I/We accept that any contract resulting from this offer will be for a period as determined by the CSIR.

Furthermore, I/we agree to a penalty clause/s which will allow CSIR to invoke a penalty against us for non-compliance with material terms of this RFP including the delayed delivery of the Services due to non-performance by ourselves, failure to meet Subcontracting.

I/we agree that non-compliance with any of the material terms of this RFP, including those mentioned above, will constitute a material breach of contract and provide CSIR with cause for cancellation.

ADDRESS FOR NOTICES

The law of the Republic of South Africa shall govern any contract created by the acceptance of this RFP. The domicilium citandi et executandi shall be a place in the Republic of South Africa to be specified by the Respondent hereunder, at which all legal documents may be served on the Respondent who shall agree to submit to the jurisdiction of the courts of the Republic of South Africa. Foreign Respondents shall, therefore, state hereunder the name of their authorised representative in the Republic of South Africa who has the power of attorney to sign any contract which may have to be entered into in the event of their Proposal being accepted and to act on their behalf in all matters relating to such contract.

Respondent to indicate the details of its domicilium citandi et executandi hereunder:

Name of Entity:

Facsimile:

Address:

NOTIFICATION OF AWARD OF RFP

As soon as possible after approval to award the contract(s), the successful Respondent [**the Service provider**] will be informed of the acceptance of its Proposal. Unsuccessful Respondents may be advised in writing of the name of the successful Service provider and the reason as to why their Proposals have been unsuccessful, for example, in the category of price, delivery period, quality, B-BBEE or for any other reason.

VALIDITY PERIOD

CSIR requires a validity period of 120 [One Hundred calendar Days from closing date] against this RFP.

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.

NAME(S) AND ADDRESS / ADDRESSES OF DIRECTOR(S) OR MEMBER(S)

The Respondent must disclose hereunder the full name(s) and address(s) of the director(s) or members of the company or close corporation [C.C.] on whose behalf the RFP is submitted.

- 1. Registration number of company / C.C.

- 2. Registered name of company / C.C.

- 3. Full name(s) of director/member(s) Address/Addresses ID Number(s)

RETURNABLE DOCUMENTS

All Sections, as indicated in the footer of each page, must be signed, stamped and dated by the Respondent. **Returnable Documents** means all the documents, Sections and Annexures, as listed in the tables below.

a) Mandatory Returnable Documents

Failure to provide any Mandatory Returnable Documents at the closing date and time of this bid will result in a Respondent's disqualification. Bidders are therefore urged to ensure that all these documents are returned with their Proposals.

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

MANDATORY RETURNABLE DOCUMENTS	SUBMITTED [Yes/No]
Annexure D: Pricing Schedule	

b) Essential Returnable Documents

In addition to the requirements of section (a) above, Respondents are further required to submit with their Proposals the following **essential Returnable Documents** as detailed below.

Essential Returnable Documents required for evaluation purposes:

Failure to provide any essential Returnable Documents used for purposes of scoring a bid, by the closing date and time of this bid will not result in a Respondent's disqualification. However, Bidders will receive an automatic score of zero for the applicable evaluation criterion. Bidders are therefore urged to ensure that all these documents are returned with their Proposals.

Please confirm submission of these essential Returnable Documents by so indicating [Yes or No] in the table below:

ESSENTIAL RETURNABLE DOCUMENTS USED FOR SCORING	SUBMITTED
<p>Annexure : Preference Points Award Form in Terms of the Preferential Procurement Regulations 2022 (Mandatory documents to claim preference points)</p> <ul style="list-style-type: none"> • Valid copy of BBEE certificate/ sworn affidavit <ul style="list-style-type: none"> ✓ In case of unincorporated trust, consortium or joint venture, they must submit their consolidated B-BBEE scorecard with their <u>individual B-BBEE Certificate or Sworn Affidavit.</u> ✓ In case of sub-contracting both parties must submit copies of their valid BBEE certificates. <p>NB: Non-submission or invalid submission will result in zero points. Should the individual entity's B-BBEE Certificate or Sworn Affidavit of the unincorporated trust, consortium or joint venture parties <u>be invalid</u>, the joint venture scorecard will also be invalid.</p>	

Other Essential Returnable Documents:

Failure to provide other essential Returnable Documents may result in a Respondent's disqualification. Bidders are therefore urged to ensure that all these documents are returned with their Proposals. However, if the bidder indicated YES in the SUBMITTED column and the documents is not submitted, then the bidder may be given two (2) days to provide the missing information.

Please confirm submission of these essential Returnable Documents by indicating Yes or No in the table below

<u>OTHER ESSENTIAL RETURNABLE DOCUMENTS</u>	SUBMITTED [Yes/No]
Annexure A: Standard Bidding Document (SBD) 1 Form	
Annexure E: Proposal Form and List of Returnable documents (<i><u>This document</u></i>)	
Annexure F: Certificate of Acquaintance with RFP, Terms & Conditions & Applicable Documents	

Annexure H: Standard Bidding Document (SBD) 4 Form	
Annexure I: RFP Declaration and Breach of Law Form	
Annexure J: Mutual Non-Disclosure Agreement	
Valid accreditation and status as Vendor/OEM channel partner in the Top 2 tiers as specified by the OEM	
ISO 9001: 2015 certification or similar	
A valid letter which confirms that the cloud-based solutions is hosted in South Africa or in a country that offers an adequate level of personal information protection as at the sole discretion of the CSIR. In the event that the Bidder is hosting through a 3 rd party, the Bidder must supply a letter from its hosting partner confirming that the data at rest is hosted within the borders of South Africa or in a country that offers an adequate level of personal information protection as at the sole discretion of the CSIR.	
In the case of Joint Ventures, bidder must submit a copy of the <u>signed</u> Joint Venture Agreement.	
In the case of subcontracting arrangements, bidder must submit a copy of the <u>signed</u> subcontracting agreement.	
Three (3) latest Audited Annual Financial Statements (Only latest Audited Annual Financial Statements for period between year 2020 and year 2023 would be considered).	

CONTINUED VALIDITY OF RETURNABLE DOCUMENTS

The successful respondent will be required to ensure the validity of all returnable documents, including but not limited to its Tax Clearance Certificate and valid B-BBEE Verification Certificate, for the duration of any contract emanating from this RFP. Should the Respondent be awarded the contract [**the Agreement**] and fail to present CSIR with such renewals as and when they become due, CSIR shall be entitled, in addition to any other rights and remedies that it may have in terms of the eventual Agreement, to terminate such Agreement forthwith without any liability and without prejudice to any claims which CSIR may have for damages against the Respondent.

SIGNED at _____ on this ____ day of _____ 20_____

SIGNATURE OF WITNESSES AND NAME OF WITNESSES

1 _____

Name _____

2 _____

Name _____

SIGNATURE OF RESPONDENT'S AUTHORISED REPRESENTATIVE:

Name: _____

Designation: _____

Annexure F

Certificate of Acquaintance with RFP, Terms & Conditions & Applicable Documents

The Provision of Payroll Solution, the Implementation thereof and Payroll Support services to the CSIR for a period of five (5) years.

RFP No. 3594/09/10/2023

By signing this certificate the Respondent is deemed to acknowledge that he/she has made himself/herself thoroughly familiar with, and agrees with all the conditions governing this RFP. This includes those terms and conditions contained in any printed form stated to form part hereof, including but not limited to the documents stated below. As such, CSIR will recognise no claim for relief based on an allegation that the Respondent overlooked any such condition or failed properly to take it into account for the purpose of calculating tendered prices or any other purpose:

Should the Bidder find any terms or conditions stipulated in any of the relevant documents quoted in the RFP unacceptable, it should indicate which conditions are unacceptable and offer alternatives by written submission on its company letterhead, attached to its submitted Bid. Any such submission shall be subject to review by CSIR's Legal Counsel who shall determine whether the proposed alternative(s) are acceptable or otherwise, as the case may be. A material deviation from any term or condition may result in disqualification.

Bidders accept that an obligation rests on them to clarify any uncertainties regarding any bid which they intend to respond on, before submitting the bid. The Bidder agrees that he/she will have no claim based on an allegation that any aspect of this RFP was unclear but in respect of which he/she failed to obtain clarity.

The bidder understands that his/her Bid will be disqualified if the Certificate of Acquaintance with RFP documents included in the RFP as a returnable document, is found not to be true and complete in every respect.

SIGNED at _____ on this _____ day of _____ 20_____

SIGNATURE OF WITNESSES AND NAME OF WITNESSES

1 _____

Name _____

2 _____

Name _____

SIGNATURE OF RESPONDENT'S AUTHORISED REPRESENTATIVE:

Name: _____

Designation: _____

Annexure G

Preference Points Award Form in Terms of the Preferential Procurement Regulations 2022

The Provision of Payroll Solution, Implementation thereof and Payroll Support services to the CSIR for a period of five (5) years

RFP No. 3594/09/10/2023

This preference form must form part of all bids invited. It contains general information and serves as a claim form for the preference points allocated on the basis of specific goals outlined in point 3 below.

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF SPECIFIC GOALS, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1. The following preference point systems are applicable to this bid:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).
- 1.2. Points for this bid shall be awarded for:
- (a) Price; and
 - (b) Preference Points based on specific goals.
- 1.3. The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
Preference Points	20
Total points for Price and Preference Points must not exceed	100

- 1.4. Failure on the part of a bidder to submit proof of preference points together with the bid, will be interpreted to mean that preference points are not claimed.
- 1.5. The CSIR reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the CSIR.

2. POINTS AWARDED FOR PRICE

2.1. THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

80/20

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

3. PREFERENCE POINTS AWARDED

- 3.1. In terms of Regulation 4 (2) and 4 (2) of the Preferential Procurement Regulations, preference points may be awarded to a bidder for the specific goal specified for the tender in accordance with the table below:
- 3.2. Specific goals must be determined per tender.

Specific Goals	Preference Points
Black Ownership	20
Total	20

3.3. Total preference points per specific goal to be determined per tender.

3.3.1. Total preference points per specific goal to be awarded as follows:

3.3.1.1. Preferential points for black ownership will be awarded as follows:

Black Ownership	% of Preferential points
Bidder with 100% black ownership	100%
Bidder with 51% to 99% black ownership	50%
Bidder with less than 51% black ownership	0%

3.4. Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture¹, will qualify for preference points as a legal entity (Incorporated), provided that the entity submits its valid B-BBEE certificate. Only valid BBBEE certificates issued by SANAS accredited verification agency will be considered for allocation of points.

A trust, consortium or joint venture will qualify for preference points as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid. Only valid consolidated BBBEE certificates issued by SANAS accredited verification agency will be considered for allocation of points.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. The CSIR will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement. Furthermore, in bids where unincorporated joint venture and/or consortium/sub-contractors are involved, each party must submit a separate TCS PIN and CSD number.

The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the

¹ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

3.5. Sub-contracting

A bidder must not be awarded preference points 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 EME that has the capability and ability to execute the sub-contract.

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 bidder concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

4. BID DECLARATION

Bidders who claim points in respect of specific goals **must** submit the following documents:

Mandatory documents to claim preference points	Submitted	
	Yes	No
Valid copy of BBBEE certificate/ sworn affidavit to claim Black Ownership preference points ²	√	√

² In case of unincorporated trust, consortium or joint venture, they must submit their consolidated B-BBEE scorecard with submitting their **individual B-BBEE Certificate or Sworn Affidavit**, and each party must submit a separate TCS PIN and CSD number.
In case of sub-contracting both parties must submit copies of their valid BBBEE certificates

DECLARATION WITH REGARD TO COMPANY/FIRM

Name of company/firm:.....

VAT registration number:.....

Company registration number:.....

I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the documents submitted to claim preference points based on the specific goals are valid, and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 3 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 3, the contractor may be required to furnish further documentary proof to the satisfaction of the CSIR that the awarded are correct;
- iv) If any document is obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the CSIR may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.
- v) If the CSIR is of the view that a bidder submitted false information regarding a specific goal, it must—
 - (a) inform the bidder accordingly, and
 - (b) give the bidder an opportunity to make representations within 14 days as to why the tender may not be disqualified or, if the tender has already been awarded to the bidder, the contract should not be terminated in whole or in part.
- vi) After considering the representations referred to in subregulation (v)(b), the CSIR may, if it

concludes that such information is false—

- (a) disqualify the bidder or terminate the contract in whole or in part; and
- (b) if applicable, claim damages from the bidder.

WITNESSES
1.
2.

..... SIGNATURE(S) OF BIDDERS(S)
DATE:
ADDRESS.....

Annexure H

Standard Bidding Document (SBD) 4

RFP No. 3594/09/10/2023

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest³ in the enterprise, employed by the state?

YES /NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

³ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? YES /NO

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? YES /NO

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

I, the undersigned, (name).....in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium⁴ will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

⁴ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

Annexure I

DECLARATION BY BIDDER AND BREACH OF LAW FORM

The Provision of Payroll Solution, Implementation thereof and Payroll Support services
to the CSIR.

RFP No. 3594/09/10/2023

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

NAME OF ENTITY:

We _____ do hereby certify that:

1. CSIR has supplied and we have received appropriate responses to any/all questions [as applicable] which were submitted by ourselves for RFP Clarification purposes;
2. we have received all information we deemed necessary for the completion of this Request for Proposal [RFP];
3. we have been provided with sufficient access to the existing CSIR facilities/sites and any and all relevant information relevant to the Services as well as CSIR information and Employees and has had sufficient time in which to conduct and perform a thorough due diligence of CSIR's operations and business requirements and assets used by CSIR. CSIR will therefore not consider or permit any pre- or post-contract verification or any related adjustment to pricing, service levels or any other provisions/conditions based on any incorrect assumptions made by the Respondent in arriving at his Bid Price.
4. at no stage have we received additional information relating to the subject matter of this RFP from CSIR sources, other than information formally received from the designated CSIR contact(s) as nominated in the RFP documents;
5. we are satisfied, insofar as our entity is concerned, that the processes and procedures adopted by CSIR in issuing this RFP and the requirements requested from Bidders in responding to this RFP have been conducted in a fair and transparent manner; and
6. furthermore, we declare that a family, business and/or social relationship **exists / does not exist** [delete as applicable] between an owner / member / director / partner / shareholder of

our entity and an employee or board member of the CSIR Group including any person who may be involved in the evaluation and/or adjudication of this Bid.

7. In addition, we declare that an owner / member / director / partner / shareholder of our entity **is / is not** [delete as applicable] an employee or board member of the CSIR.
8. If such a relationship as indicated in paragraph 6 exists, the Respondent is to complete the following section:

FULL NAME OF OWNER/MEMBER/DIRECTOR/
PARTNER/SHAREHOLDER: ADDRESS:

Indicate nature of relationship with CSIR:

[Failure to furnish complete and accurate information in this regard will lead to the disqualification of a response and may preclude a Respondent from doing future business with CSIR]

9. We declare, to the extent that we are aware or become aware of any relationship between ourselves and CSIR [other than any existing and appropriate business relationship with CSIR] which could unfairly advantage our entity in the forthcoming adjudication process, we shall notify CSIR immediately in writing of such circumstances.
10. We accept that any dispute pertaining to this Bid will be resolved through the Ombudsman process and will be subject to the Terms of Reference of the Ombudsman. The Ombudsman process must first be exhausted before judicial review of a decision is sought.
11. We further accept that CSIR reserves the right to reverse an award of business or decision based on the recommendations of the Ombudsman without having to follow a formal court process to have such award or decision set aside.

BREACH OF LAW

12. We further hereby certify that I/we (the bidding entity and/or any of its directors, members or partners) have/have not been [delete as applicable] found guilty during the preceding 5 [five] years of a serious breach of law, including but not limited to a breach of the Competition Act, 89 of 1998, by a court of law, tribunal or other administrative body. The type of breach that

the Respondent is required to disclose excludes relatively minor offences or misdemeanours, e.g. traffic offences. This includes the imposition of an administrative fine or penalty.

Where found guilty of such a serious breach, please disclose:

NATURE OF BREACH:

DATE OF BREACH: _____

Furthermore, I/we acknowledge that CSIR reserves the right to exclude any Respondent from the bidding process, should that person or entity have been found guilty of a serious breach of law, tribunal or regulatory obligation.

SIGNED at _____ on this _____ day of _____ 20__

For and on behalf of _____ duly authorised hereto	AS WITNESS:
Name:	Name:
Position:	Position:
Signature:	Signature:
Date	Registration No of Company/CC
Place	Registration Name of Company/CC

Annexure J

Mutual Non-Disclosure Agreement

RFP No. 3594/09/10/2023

MUTUAL NON-DISCLOSURE AGREEMENT

1. Preamble

The Parties as identified herein are engaged in discussions relating to their potential collaboration in the Field as likewise described therein; are by virtue thereof required to disclose Confidential Information to one another and have agreed to do so subject to the terms and conditions as set out in this agreement.

2. Definitions

1.1 The following words and/or phrases, when used in this agreement, shall have the following meanings:

1.1.1 “Confidential Information” shall mean all scientific, technical, business, financial, past, present or future research, development, business activities, products, services and technical knowledge or marketing information, whether inside or outside the Field, which one party (the “Disclosing Party”) discloses to the other party (the “Receiving Party”) in connection with the discussions, and either has been identified in writing as confidential or is of such a nature (or has been disclosed in such a way) that it should be obvious to the Receiving Party that it constitutes Confidential Information. (Without limiting the generality of the foregoing, “Confidential Information” shall include any information that falls within the definition of ‘Personal Information’

1.1.2 “Disclosing Party” shall mean the Party disclosing Confidential Information under this agreement;

1.1.3 “Disclosing Purpose” shall mean, as pertains to any particular joint opportunity(ies) in the

Field, the discussions held or to be held between the Parties regarding their possible collaboration and future working relationship with regards to any such opportunity(ies);

1.1.4 “Effective Date’ shall mean the date of the commencement of this agreement herein”;

1.1.5 “Notice” shall mean a written document addressed by one Party to the other and either delivered by hand; sent per registered post or telefaxed to the addresses as indicated herein”;

1.1.6 “Personal Information” means any information that falls within the definition of ‘Personal Information’ as defined in the Protection of Personal Information Act, No 4 of 2013 (“POPI”);

1.1.7 “Receiving Party” shall mean the Party receiving Confidential Information under this agreement;

“Responsible Party” means a public or private body or any other person which, alone or in conjunction with others, determines the purpose of and means for processing personal information, as defined in POPI.

3. Obligation of Confidentiality

1.2 The Receiving Party undertakes and agrees:

1.2.1 to use the Disclosing Party’s Confidential Information only to give effect to the Disclosing Purpose;

1.2.2 to hold in strict confidence and not to publish or disclose to any unauthorised third parties any of the Confidential Information of the Disclosing Party without the prior written consent of the Disclosing Party;

1.2.3 to use the same degree of care (and in any event not less than reasonable care) to

safeguard the confidentiality of the Disclosing Party's Confidential Information that it uses to protect its own information of like kind;

- 1.2.4 to limit any disclosure of such Confidential Information only to those of its employees and professional advisors who have a specific need –to- know to access such Confidential Information and either entered into a written agreement which impose, or are otherwise bound by the same restrictions as those imposed upon it by virtue of this agreement;
- 1.2.5 not to disclose or reveal to any third party, whomsoever, either the fact that discussions or negotiations are taking, or have taken, place between the Parties; the content of any such discussions, or other facts relating to the Disclosing Purpose;
- 1.2.6 on termination of this agreement, to act with the Disclosing Party's Confidential Information in accordance with a Notice delivered to it by the Disclosing Party, and if no such Notice is delivered to the Recipient, to destroy the Disclosing Party's Confidential Information in a similar manner to which it would destroy its own Confidential Information.

4. Protection of Personal Information

- 1.3 The Party(ies) undertake(s) to:-
 - 1.3.1 comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;
 - 1.3.2 treat all Personal Information strictly as defined within the parameters of POPI;
 - 1.3.3 process Personal Information only in accordance with the consent it was obtained for, for the purpose agreed, any lawful and reasonable written instructions received from the applicable Responsible Party and as permitted by law;
 - 1.3.4 process Personal Information in compliance with the requirements of all applicable laws;

- 1.3.5 secure the integrity and confidentiality of any Personal Information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss, damage, unauthorised destruction, access, use, disclosure or any other unlawful processing of Personal Information;

- 1.3.6 not transfer any Personal Information to any third party in a foreign country unless such transfer complies with the relevant provisions of POPI regarding transborder information flows; and

- 1.3.7 not retain any Personal Information for longer than is necessary for achieving the purpose in terms of this Agreement or in fulfilment of any other lawful requirement.

- 1.4 The Party(ies) undertake(s) to ensure that all reasonable measures are taken to:

- 1.4.1 identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;

- 1.4.2 establish and maintain appropriate security safeguards against the identified risks;

- 1.4.3 regularly verify that the security safeguards are effectively implemented;

- 1.4.4 ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;

- 1.4.5 provide immediate notification to the Responsible Party if a breach in information security or any other applicable security safeguard occurs; provide immediate notification to the Responsible Party where there are reasonable grounds to believe that the Personal Information has been accessed or acquired by any unauthorised person;

- 1.4.6 remedy any breach of a security safeguard in the shortest reasonable time and provide the Responsible Party with the details of the

breach and, if applicable, the reasonable measures implemented to address the security safeguard breach;

1.4.7 provide immediate notification to the Responsible Party where either party has, or reasonably suspects that, Personal Information has been processed outside of the purpose agreed to or consented to;

1.4.8 provide the Responsible Party, upon request, with all information of any nature whatsoever relating to the processing of the Personal Information for the purpose in terms of this Agreement and any applicable law; and

1.4.9 notify the CSIR, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the CSIR.

1.5 The CSIR reserves the right to inspect the Personal Information processing operations, as well as the technical and organisational information security measures employed by the contracting Party to ensure compliance with the provisions of clause 4.

1.6 The provisions of clause 4 shall survive the termination of this Agreement, regardless of cause, in perpetuity.

5. Exclusions

1.7 The Receiving Party recognises that this agreement is not intended to restrict use or disclosure of any portion of the Disclosing Party's Confidential Information which:

1.7.1 is as at the Effective Date, or later, made known to the public or otherwise enters the public domain through no default by the Receiving Party of its obligations under this Agreement;

1.7.2 it can show was in its possession prior to the earliest disclosure by the Disclosing Party, as evidenced by written documents in its files;

1.7.3 is rightfully received by it from a third party having no obligation of confidentiality to the Disclosing Party;

1.7.4 is independently developed by the Receiving Party by a person(s) who did not have access to the Confidential Information of the Disclosing Party;

1.7.5 is disclosed by the Receiving Party after receipt of written permission from the Disclosing Party; or

1.7.6 it is requested or required by subpoena, court order, or similar process to disclose, provided that, in such an event, it will provide the Disclosing Party with prompt written notice of such request(s) so that the latter may seek an appropriate protective order and/or waive the Receiving Party's compliance with the provisions of this agreement.

6. Ownership and Provision of Information

1.8 The Disclosing Party shall retain ownership of all its Confidential Information as disclosed hereunder.

1.9 Nothing contained in this agreement or in any disclosures made hereunder shall create or imply, or be construed as to grant to the Receiving Party any license or other rights in or to the Confidential Information and/or any intellectual property rights attached thereto, or act as a waiver of any rights that the Disclosing Party may have to prevent infringement or misappropriation of any patents, patent applications, trademarks, copyright, trade secrets, know-how or other intellectual property rights owned or controlled by the Disclosing Party as at the Effective Date.

1.10 The Disclosing Party provides the Confidential Information "as is" and accordingly no disclosure thereof by it hereunder shall constitute any representation, warranty, assurance, guarantee or inducement by such Disclosing Party with respect to infringement of patents or other rights of third parties, nor is any warranty or representation as to the

accuracy, completeness, or technical or scientific quality of any of the Disclosing Party's Confidential Information provided hereunder. (For the avoidance of doubt it is stated expressly that the Disclosing Party neither makes, nor have made, any representation or warranty as to the merchantability or fitness for a particular purpose of any Confidential Information disclosed hereunder).

7. Term of Obligation

1.11 The Parties' obligations concerning non-disclosure of Confidential Information contained in the above clauses shall commence on the Effective Date and shall continue for five (5) years from the date of each disclosure, unless otherwise agreed between the parties in writing, where after such obligations shall forthwith terminate.

8. No Violation

1.12 Each party represents that its compliance with the provisions of this agreement will not violate any duty which such party may have towards any third party, including obligations concerning the provision of services to others, confidentiality of information and assignment of inventions, ideas, patents or copyright.

9. Breach

1.13 It is acknowledged that the breach of this agreement by the Receiving Party would cause the Disclosing Party irreparable injury not compensable in monetary damages alone. Accordingly, in the event of a breach, or a threat of a breach, the Disclosing Party, in addition to its other remedies, is entitled to a restraining order, preliminary injunction or similar relief so as to specifically enforce the

terms of this agreement or prevent, cure or reduce the adverse effects of the breach.

10. DOMICILIUM CITANDI ET EXECUTANDI

1.14 The Parties hereto respectively choose as their *domicilium citandi et executandi* for all purposes of, and in connection with this agreement, the physical addresses and contact details stated herein.

11. Notices

1.15 Any Notice to be given hereunder shall be given in writing and may be given either personally or may be sent by post or facsimile and addressed to the relevant party at its *domicilium citandi et executandi* address as chosen herein. Any notice given by post shall be deemed to have been served on the expiry of 7 (seven) working days after same is posted by recorded delivery post or air mail. Any notice delivered personally or sent by facsimile shall be deemed to have been served at the time of delivery or sending.

12. Governing Law and Jurisdiction

1.16 This agreement will be governed and construed by the laws of the Republic of South Africa and the Parties hereby submit to the exclusive jurisdiction of the South African courts to hear any dispute arising therefrom which the Parties are unable to settle amicably.

Annexure J Mutual Non-Disclosure Agreement

RFP No. 3594/09/10/2023

13. General

- 1.17 This agreement comprises the entire agreement between the parties concerning the subject matter and supersedes all prior oral and written agreements between them.
- 1.18 No waiver, alteration or cancellation of any of the provisions of the Agreement shall be binding unless made in writing and signed by the party to be bound.
- 1.19 The parties hereby warrant that the officials signing this agreement have the power to do so on behalf of the parties.
- 1.20 No public announcement, such as a media release, or disclosure beyond those disclosures authorised for Confidential Information hereunder may be made by either party concerning this agreement without the prior written approval of the other party.
- 1.21 Neither party is, by virtue of this agreement, authorised to use the name, logo(s) or trademarks of the other in connection with any advertising, publicity, marketing or promotional materials or activities, or for any other purpose whatsoever, without the prior written consent of the other party. For purposes of this clause, it is also recognised that, under the provisions of section 15 (1) of the Merchandise Marks Act, Act No 17 of 1941 of the Republic of South Africa, the use of the abbreviation of the name of the Council for Scientific and Industrial Research, "WNNR" and CSIR, is prohibited in connection with any trade, business, profession or occupation or in connection with a trade mark, mark or trade description applied

to goods, other than with the consent of the CSIR.

- 1.22 Both Parties shall remain free to use, in the normal course of its business, its general knowledge, skills and experience incurred before, during or after the discussions envisaged hereunder. (To this end, it is also recorded that nothing in this Agreement shall be construed as constituting an exclusive arrangement between the parties and both Parties shall remain free to explore market opportunities in the Field, unless otherwise agreed to in writing in a subsequent agreement.)

ANNEXURE J: MUTUAL NDA

1. Parties to the NDA

THE CSIR, a statutory council, duly established under Act 46 of 1988 through its Operating Unit of herein represented byin his/her capacity as Executive Director and he/ she being duly authorised thereto; **and**

.....
.....,
registration number:....., with limited liability
duly incorporated under the applicable laws of the Republic of South Africa herein represented by
..... in his/her capacity as
..... and he/she being duly
authorised thereto.

2. Contact Details for Purposes of Clause 10:

1.23 The CSIR

Physical Address:

Meiring Naude Road

Brummeria

Pretoria

0002

FOR ATTENTION:

Postal Address:

PO BOX 395

Pretoria

0001

FOR ATTENTION:

Telefax Communication:

FOR ATTENTION:

.....

Physical Address:
FOR ATTENTION:

Postal Address:
FOR ATTENTION:

Telefax Communication:
FOR ATTENTION:

3. Effective Date:.....

4. THE FIELD:

SIGNED ON THIS THE.....DAY OF.....AT..... IN THE PRESENCE OF THE
FOLLOWING WITNESSES:

- 1.
- 2.

FOR THE CSIR

SIGNED ON THIS THE.....DAY OF.....AT..... IN THE PRESENCE OF THE
FOLLOWING WITNESSES:

- 1.
- 2.

FOR XXXX

Annexure K

Draft Supplier Agreement

**The Provision of Payroll Solution, Implementation thereof and Payroll Support services
to the CSIR for a period of five (5) years.**

RFP No. 3594/09/10/2023