

Request for Proposals (RFP)

The Provision of External Quality Assessment Review for the CSIR Internal Audit Services

RFP No. 1033/30/09/2022

Date of Issue	Friday, 16 September 2022	
Closing Date and Time	Date: Friday, 30 September 2022 Time: 16:30	
Contact Details for Submission of Proposals and Enquiries	Strategic Procurement Services	E-mail: tender@csir.co.za <i>(Please use the RFP No. as subject reference)</i>
CSIR business hours	08:00 – 16:30	
Category	Professional Services	

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SECTION A – TECHNICAL INFORMATION

1 INTRODUCTION

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

2 BACKGROUND

In terms of the International Standards for the Professional Practice of Internal Auditing (Standards) of the Institute of Internal Auditors (IIA), external assessments of the internal audit activity must be conducted at least once every five years by a qualified, independent assessor or assessment team from outside the organization.

The CSIR's Internal Audit Services (IAS) is due for an external quality assessment since the previous one was concluded in 2016.

IAS will conduct a self-assessment, which will be followed by an independent (external) validation – to include the following:

- A comprehensive and fully documented self-assessment process, which emulates the external assessment process, at least with respect to evaluation of conformance with the definition of Internal Auditing, the Code of Ethics and the Standards.
- An independent, on-site validation by a qualified, independent reviewer.
- Economical time and resource requirements
- Limited attention to other areas – such as benchmarking, review and consultation as to employment of leading practices and interviews with senior and operating management.

An internal team under the guidance of the Chief Audit Executive (CAE) will perform and fully document the self-assessment process and prepare a draft report similar to that of external assessment including the CAE's judgement on conformance with the Standards.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited for the provision of external validation of the quality assessment work of the internal validation team of the CSIR's Internal Audit Service.

4 SCOPE OF WORK

The service provider will be required to provide an independent review through the following:

- Review of the comprehensive and fully documented self-assessment process performed by IAS.
- Perform limited number of interviews with stakeholders, IAS staff and the CAE.
- Review the conformance to the Internal Audit definition, Code of Ethics and the IIA Standards.
- Review of internal audit charter, policies, procedures and files.
- Assess the conformance conclusions reported by the internal assessment team.
- The service provider is expected to provide an independent validation report, with an opinion confirming results of the internal assessment or expressing disagreement as deemed necessary.

5 PROPOSAL SPECIFICATION AND REQUIRED DOCUMENTATION

All proposals are to be submitted in a format specified in this RFP.

Bidders are to submit responses in the following format prescribed below. Failure to adhere to this may result in disqualification and the tender may be deemed as non-responsive.

5.1 Technical Proposal

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

- Covering letter.
- Company profile clearly stipulating the number of years rendering similar services.
- Service provider's performance on past and current projects – Provide not less than five (5) contactable client references for similar services provided in the past 2 years.
- CVs and/or profiles of the designated team who will work on the assignment.

- Provide a clear methodology and approach with timelines for delivering the required outcomes as outlined in this enquiry.

5.2 Financial Proposal:

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

- Proposed cost/ commercial offer on official company letterhead.
- Bidders must cost as per pricing schedule provided on section 31 below.
- The pricing must be firm and inclusive of all costs and disbursements required to render the required services to the CSIR.
- A detailed cost breakdown of the proposed cost in line with scope of work and deliverables.
- Provide a valid original copy of a B-BBEE certificate or valid sworn affidavit (RSA suppliers only).

6 FUNCTIONAL EVALUATION CRITERIA

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

Evaluation criteria	Description	Weight (%)
1. Company Experience	The service provider must have proven track record of industry experience. A company profile and a minimum of five (5) references of similar work performed in the past two (2) years must be provided	20
2. Methodology	Clearly defined and detailed methodology for performing independent validation must be provided	40
3. Experience of key personnel	The service provider's key personnel of the proposed review team must have relevant qualifications, skills and experience in performing external validations or full scope assessment N.B: CVs and Qualifications must be provided	40

6.2 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **75%** and less than **50%** on any of the individual criteria will be eliminated from further evaluation.

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

7 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Bidders that submit late proposals will not be considered.
- Bidders that submit to the incorrect location or email address will be eliminated (***Please submit electronically to tender@csir.co.za***)
- Bidders that are listed on the National Treasury database of restricted suppliers will not be considered.
- Bidders that are registered on the National Treasury Register of Tender Defaulters will not be considered.
- Bidders that do not submit a fully completed and signed **SBD 1** and **SBD 4 Form** will not be considered.

8 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- Be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: www.csd.gov.za
- Provide the CSIR with their CSD registration number; and
- Provide the CSIR with a copy of their valid B-BBEE certificate or sworn affidavit. If no certificate can be provided, no points will be scored during the evaluation process. (RSA suppliers only).

SECTION B – TERMS AND CONDITIONS

9 SUBMISSION OF ENQUIRIES AND CONTACT WITH THE CSIR

9.1 All enquiries must be submitted electronically at: tender@csir.co.za

(Please use the RFP No. as subject reference)

9.2 All enquiries must be submitted no later than Thursday, 22 September 2022 at 16:30

NB: 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.

10 TENDER PROGRAMME

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

- Issue of tender documents: 16 September 2022
- Last date for submission of queries: 22 September 2022
- Closing / submission Date: 30 September 2022

11 PROCEDURE FOR SUBMISSION OF PROPOSALS

11.1 All proposals must be submitted electronically to tender@csir.co.za

11.2 Proposals must consist of two parts, each of which is created a folder clearly marked: e.g.

PART 1: Technical Proposal:

RFP No. 1033/30/09/2022

For example, marked as:

(Email 1 of 2: PART 1: Technical Proposal _RFP No. 1033/30/09/2022)

PART 2: Financial Proposal:

RFP No. 1033/30/09/2022

For example, marked as:

(Email 2 of 2: PART 2: Financial Proposal_RFP No. 1033/30/09/2022)

Note: One (1) email can be submitted with two (2) separate folders clearly marked

- 11.3** Proposals submitted by companies must be signed by a person or persons duly authorised.
- 11.4** Documents submitted via cloud solutions such as: WeTransfer, Google Drive, Dropbox, etc. will not be considered.
- 11.5** Proposals and all other documents must be submitted electronically in **PDF format only**. The email and file size must not exceed a total of **25mb per email**.
- 11.6** The naming / labelling syntax of files or documents must be short and simple (e.g., B-BBEE Certificate).
- 11.7** All documents submitted electronically via email must be clearly visible.
- 11.8** The CSIR will award the contract to qualified tenderer(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price and B-BBEE.

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

12 DEADLINE FOR SUBMISSION OF PROPOSALS

Proposals shall be submitted at the email address mentioned above no later than the closing date of **Friday, 30 September 2022** and **closing time of 16:30**. The CSIR business hours are between 08:00am and 16:30.

N.B: Where a proposal is not received by the CSIR by the due date and time at the stipulated email address, it will be regarded as a late tender. **Late tenders will not be considered.**

13 AWARDING OF TENDERS

- 13.1** Awarding of tenders will be published on the CSIR's tender website. No regret letters will be sent out.

14 EVALUATION PROCESS

14.1 Evaluation of proposals

All proposals will be evaluated by an evaluation team for elimination criteria, functionality, price and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderer(s).

A three (3)-phase evaluation process will be followed:

- The first phase includes evaluation of **elimination criteria**
- The second phase includes evaluation of **functionality criteria**
- The third phase includes the evaluation of **price** and **B-BBEE** level status

Pricing Proposals will only be considered after functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

14.2 Preference points system

The 80/20 preference point system will be used where 80 points will be dedicated to price and 20 points to B-BBEE status.

Bidders **must** provide a valid B-BBEE Certificate issued by SANAS accredited agency or a certified copy of sworn affidavit that is in line with the DTI regulations to verify and confirm their B-BBEE level status.

N.B: Non submission of valid B-BBEE certificate or sworn affidavit will equal zero points for B-BBEE (RSA suppliers only).

15 PRICING PROPOSAL

- 15.1** Pricing proposal must be cross-referenced to the sections in the Technical Proposal. Any options offered must be clearly labelled. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.
- 15.2** Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.
- 15.3** Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.
- 15.4** Only firm prices* will be accepted during the tender validity period. Non-firm prices** (including prices subject to rates of exchange variations) will not be considered.
- 15.5** Payment will be according to the CSIR Payment Terms and Conditions.

16 VALIDITY PERIOD OF PROPOSAL

- 16.1** Each proposal shall be valid for a minimum period of 120 Calendar days from Closing Date. Tenderers are to note that they may be requested to extend the validity period of their proposal at the same terms and conditions if the internal evaluation processes have 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 tenderer(s)' proposal will be deemed to remain valid until a final contract has been concluded.

17 APPOINTMENT OF SERVICE PROVIDER

- 17.1** The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 17.2** Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.
- 17.3** Awarding of contracts will be published on the CSIR's tender website. No regret letters will be sent out to unsuccessful tenderers.

18 MEDIUM OF COMMUNICATION

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

19 COST OF PROPOSAL

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

20 CORRECTNESS OF RESPONSES

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

21 VERIFICATION OF DOCUMENTS

- 21.1** Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.
- 21.2** Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

22 SUB-CONTRACTING

- 22.1** A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than **25%** of the value of the contract to any other enterprise that does not qualify for at least the points that such a

tenderer qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.

- 22.2** A tenderer awarded a contract may not sub-contract more than **25%** of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.
- 22.3** If the tenderer intends to sub-contract, they must indicate the value of the work in Rands to be sub-contracted in relation to the total tendered amount. The supplier must also indicate the name(s) of the company / contractor.
- 22.4** All B-BBEE certificates or sworn affidavit(s) of the sub-contractor(s) must also be submitted. Non-submission will result in 0 points being awarded for BBBEE.

23 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

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

24 TRAVEL EXPENSES

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

25 ADDITIONAL TERMS AND CONDITIONS

- 25.1** A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.
- 25.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 25.3** In case of proposal from a joint venture, the following must be submitted together with the proposal:
- Joint venture Agreement including split of work signed by both parties;
 - The original or certified copy of the B-BBEE certificate of the joint venture;
 - The Tax Clearance Certificate of each joint venture member;
 - Proof of ownership/shareholder certificates/copies; and
 - Company registration certificates.
- 25.4** 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.
- 25.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

26 PERSONAL INFORMATION

- 26.1** 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 Client further agrees to comply with all CSIR’s reasonable internal governance requirements pertaining to data protection.
- 26.2** 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).

- 26.3** The Client consents to the transfer of such information to CSIR's business contacts outside South Africa in order to further its business interests.
- 26.4** 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.
- 26.5** 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.
- 26.6** Where relevant, the Client shall procure that all of its personnel, agents, representatives, contractors, sub-contractors, and mandataries shall comply with the provisions of this clause 12 (Personal Information). The CSIR shall be entitled on reasonable notice to conduct an inspection or audit Client's compliance with the requisite POPI Act safeguards.

27 CSIR RESERVES THE RIGHT TO

- 27.1** Extend the closing date;
- 27.2** Verify any information contained in a proposal;
- 27.3** Request documentary proof regarding any tendering issue;
- 27.4** Give preference to locally manufactured goods;
- 27.5** Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
- 27.6** Award this RFP as a whole or in part;
- 27.7** Cancel or withdraw this RFP as a whole or in part.

28 DISCLAIMER

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the

parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP.

The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

29 DECLARATION BY TENDERER

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

RFP No: 1033/30/09/2022

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in **RFP No. 1033/30/09/2022** at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT)
CAPACITY
SIGNATURE
NAME OF FIRM
DATE

WITNESSES	
1
2
DATE:	

30 SCHEDULE OF BIDDER’S REFERENCE INFORMATION (NB- To be submitted with technical proposal)

The bidder must provide details of the bidder's current experience in providing similar services. Only references for work done in the past two (2) years must be provided. Alternatively, reference letters may be submitted.

Company Name	Contact Person and contact details (email and telephone number)	Nature Of Work (Description of service performed and extent of Bidder's responsibilities)	Value of contract (Inclusive of VAT)	Contract duration (Start and End Dates)

31 PRICING SCHEDULE:

Bidders must price as per the below pricing schedule for the purposes of evaluation:

No.	Deliverable / Task	Unit of Measure	Quantity	Price (Excl. VAT)
1.	Review of the comprehensive and fully documented self-assessment process performed by IAS.	Each	1	
2.	Perform limited number of interviews with stakeholders, IAS staff and the CAE.	Each	1	
3.	Review the conformance to the Internal Audit definition, Code of Ethics and the IIA Standards.	Each	1	
4.	Review of internal audit charter, policies, procedures and files.	Each	1	
5.	Assess the conformance conclusions reported by the internal assessment team.	Each	1	
6.	Provide an independent validation report, with an opinion confirming results of the internal assessment or expressing disagreement as deemed necessary.	Each	1	
7.	Disbursements and other fees	Each	1	
	Sub-total			
	VAT			
	Total			

Notes to Pricing:

Bidders are to note that if the price offered by the highest scoring bidder is not market related, CSIR may not award the contract to that bidder. CSIR may:

- negotiate a market-related price with the Respondent scoring the highest points or cancel the RFP.
- if that bidder does not agree to a market-related price, negotiate a market-related price with the bidder scoring the second highest points or cancel the RFP.
- if the bidder scoring the second highest points does not agree to a market-related price, negotiate a market-related price with the bidder scoring the third highest points or cancel the RFP.
- If a market-related price is not agreed with the bidder scoring the third highest points, CSIR may cancel the RFP.

NB: The above cost must be inclusive of all costs required to render the required services as per above scope of work and deliverables.

32 ANNEXURE A – SCORING SHEET

Competence Criterion	Key Aspects of Criterion	Points Allocation (Total Points)		Weight (%)
1. Company Experience	Five years minimum experience in the performance of validation of internal audit quality assessment or a full scope external quality assessment of public entities subject to IIA standards	Non-submission of company profile or less than three years or irrelevant company experience	0	10
		Three to four years relevant company experience	5	
		Five years or more of relevant company experience	10	
	Provide a minimum of 5 references where independent validation has been performed in the past 2 years. Include contact details	Non-submission, less than three or irrelevant references	0	10
		Three to four relevant references	5	
		Five or more relevant references	10	
2. Independent validation methodology	Detailed plan to perform a validation of the internal assessment including the timelines and deliverables	Non-submission	0	40
		Poor – Plan provided is incomplete and lacks detailed and clear timeframes and deliverables	5	
		Good – plan provided is fully completed and displays detailed and clear timeframes and deliverables	10	
3. Qualification(s), skills and experience of key personnel (provide CVs)	Three years minimum experience of the Team Leader in the practice of internal auditing at management level	Non-submission of CV(s) or irrelevant experience	0	10
		One to two years of relevant experience	5	
		Three or more years of relevant experience	10	
	The Team Leader has previously worked as a team member on an external quality assessment. Provide evidence	No submission	0	10
		Proof of previous participation however, not on an external quality assessment	5	

		Proof of previous participation on an external quality assessment	10	
The Team Leader is certified audit professional (e.g., CIA, CA)		No submission	0	10
		Irrelevant qualification(s) submitted	5	
		Proof of relevant qualification(s)	10	
Team Leader's membership of a relevant professional body in good standing (Membership valid) (<i>Individual</i>)		No submission or invalid membership	0	10
		Proof of valid membership however, in an irrelevant professional body	5	
		Proof of valid membership in a relevant professional body	10	
				100

33 ANNEXURE B RETURNABLE CHECKLIST

NOTE: The bidder is required to complete each and every schedule listed below to the best of his ability as the evaluation of tenders and the eventual contract will be based on the information provided by the bidder. Failure of a bidder to complete the schedules and forms to the satisfaction of the CSIR will inevitably prejudice the tender and may lead to rejection on the grounds that the tender is not responsive.

The bidder must complete the following returnable documents:

RETURNABLE DOCUMENTS –			
PART A: TECHNICAL RETURNABLES			
ONE ELECTRONIC COPY			
Description:	Included		
	Yes	No	
Cover Letter			
Company / Team Leader Experience <ul style="list-style-type: none"> Number of years the company has been providing similar services Team Leader's experience (number of years) in managing assignments similar to the scope of this RFP CVS of proposed Team 			
References <ul style="list-style-type: none"> A minimum of 5 references are required Complete the reference information section on page 17, section 30 or reference letters may be submitted 			
Methodology / Approach and overall technical proposals			
PART B: PRICING PROPOSAL			
ONE ELECTRONIC COPY			
1	Pricing Proposal		
2	B-BBEE Certificate or sworn affidavit		
3	Completed and duly signed SBD1 Form – <i>Annexure C</i>		
4	Completed and duly signed SBD 4 form – <i>Annexure D</i>		

Any other relevant document may be submitted, to substantiate the bidder's proposal.

34 ANNEXURE C – SBD 1 FORM

(Must be completed by the bidder and submitted with the tender)

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Bidder)

35 ANNEXURE D – SBD 4 FORM

(Must be completed by the bidder and submitted with the tender)

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Bidder)