



## Request for Proposals (RFP)

**For the provision of energy management services to the CSIR for a period of Five (5) years.**

**CSIR RFP No. 3660/08/11/2024**

Date of Issue	Tuesday, 15 October 2024	
Compulsory On-Line Briefing Session	Date and Time	Date: Monday, 28 October 2024 Time: 10H00
	MS Teams Link	<b>Microsoft Teams:</b> <a href="#">Join the meeting now</a> Meeting ID: 373 360 131 142 Passcode: ivToCg
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
	Please use RFP No and RFP Description as subject reference	
Last date for submission of enquiries/clarifications	Date: Monday, 28 October 2024 Time: 16h30	
Electronical Submission	<a href="mailto:tender@csir.co.za">tender@csir.co.za</a> If tender submission exceeds 25MB multiple emails can be sent. Please use RFP No. and RFP Description as subject reference.	
CSIR business hours	08h00 – 16h30	
Category	<b>Maintenance Services</b>	
Closing Date and Time	<b>Date: Friday, 08 November 2024</b> <b>Time: 16H30</b> <b>(Late submissions will not be considered)</b>	

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### **RFP STRUCTURE**

SECTION A: GENERAL RFP TERMS AND CONDITIONS  
SECTION B: EVALUATION METHODOLOGY / PROCESS

### **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

**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](mailto: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***). The CSIR business hours are between **08h00** and **16h30**.

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 two separate emails with the following subject:

**PART 1: Technical Proposal (Please indicated the RFP Number on each File/folder)**

**PART 2: Pricing Proposal, Specific Goals claim documentation: RFP No.: (Please indicated 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 considerations and where practicable, will be returned unopened to the Bidder(s).

- 2.6 Proposals received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, will be returned unopened to the Bidder(s).
- 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 qualified bidder(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price, specific goals and objective criteria.

### **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 condemn 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 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).
- 5.2 Prices that are subject to escalation and exchange rate fluctuations are to be clearly indicated, with the currency and ROE used in the quotation must be clearly indicated.
- 5.3 Price should include additional cost elements such as travel cost, freight, insurance until acceptance, duty where applicable, etc.
- 5.4 Payment will be according to the [CSIR Payment Terms and Conditions](#).
- 5.5 Please provide a detail pricing using a Pricing Schedule/Bill of Quantities 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 bidder who scores the highest total number of points during the evaluation process, except where the law permits otherwise.

- 6.2 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.
- 6.3 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 applicable form of contract ( i.e. **Draft Supplier Agreement**) regulating the specific terms and conditions applicable to the services being procured by the CSIR, more or less in the format of the draft Service Level Indicators (Annexure J) included in this tender pack.
- 7.2 Bidder(s) are requested to:
- 7.2.1. Comment on draft Service Level Indicators and where necessary, make proposals to the indicators;
  - 7.2.2. Explain each comment and/or amendment; and
  - 7.2.3. Use an easily identifiable colour font or “track changes” for all changes and/or amendments to the Service Level Indicators for ease of reference.
- 7.3 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 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 in regard to 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 indication the lead partner, including split of work;
  - Copy of a valid certificate or consolidated B-BBEE score card;
  - 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 No goods and/or services should be delivered to the CSIR without an official CSIR Purchase order or signed supplier agreement. The CSIR purchase order number must be quoted on the invoice. Invoices without CSIR purchase order numbers will be returned to supplier.
- 13.6 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 before closing date and time 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 tender 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 Award this RFP to multiple bidders;
- 14.10 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;
- 14.11 Post tender negotiate on any elements on the bid, including but not limited to technical, transformation, price, and contractual terms and conditions.;
- 14.12 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 charged 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.

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 30 (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 regard 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

For the Provision of Energy Management 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
Only bidders that comply with ALL the criteria set on paragraph 1.1 on <b>Phase 1</b> below will proceed to Technical/Functional Evaluation (Phase 2).	Bidder(s) are required to achieve a predetermined minimum threshold on each of the individual criteria, and a predetermined minimum threshold on 100 points overall. Only bidder (s) who met and/or exceeded the minimum threshold points on <b>Phase 2</b> below will proceed to Price and Preference Points Evaluation. (Phase 3)	Bidder(s) will be evaluated out of <b>100 points</b> i.e. <b>80 or 90 points</b> for Price and <b>20 or 10 points</b> for Preference Points.	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).

##### 1.1 Elimination Criteria (Phase 1)

Proposals will be eliminated under the following conditions:

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



- Bidder that did not submit mandatory returnable documents as listed on **Annexure E: Proposal Form and List of Returnable Documents (Mandatory Returnable Documents Table)**.
- Bidder who does not have a valid and active CIDB registration of 1EB or 1EP or higher will not be consider.
- Bidder that did not attend the compulsory online briefing session.

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

**1.2 Technical Evaluation Criteria (Phase 2)**

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

No.	Element	Element Description	Weight
1.	<b>Company Experience</b>	<ul style="list-style-type: none"> <li>• The bidder must provide a clearly detailed company profile, stipulating the number of years rendering similar services in similar portfolios dealing with Utility Service Providers (Municipalities) and handling similar internal utility groups.</li> </ul>	10%
2.	<b>Deployment plan and setup</b>	<ul style="list-style-type: none"> <li>• The bidder must provide a detailed timeline, clearly stipulating the duration it will take to setup and commission the system for CSIR.</li> </ul>	20%
3.	<b>Billing system capability</b>	<ul style="list-style-type: none"> <li>• The bidder must ascertain that the system that is provided meets the minimum requirements of the CSIR.</li> </ul>	20%
4.	<b>Client Reference Letters</b>	<ul style="list-style-type: none"> <li>• The bidder must submit a minimum of three (3) contactable reference letters reflecting the required scope of works (energy management for services rendered between 2015 and 2024. (Appointment letters, Purchase Orders, Contracts, will not be considered).</li> <li>• The reference letters must be accessible for vetting/authentication.</li> </ul>	20%

5.	<b>Staff Capability - Project Manager</b>	<ul style="list-style-type: none"> <li>The bidder must submit a detailed CV of the Project Manager with a minimum of 5 years' work experience in utilities (mainly electricity) management. The bidder will be required to submit qualifications of the Project Manager in Electrical Engineering and/or computer science, software engineering and/or IT related degree.</li> </ul>	10
6.	<b>Staff Capability - Technician</b>	<ul style="list-style-type: none"> <li>The bidder must submit a detailed CV of the technician in utilities management or similar portfolios, with a minimum number of 5 years' work experience in electricity meter installation, testing and configuration for automatic meter readings (AMR). CV must be submitted with relevant qualifications, minimum a relevant National Diploma for the technician The bidder will be required to submit qualifications in electrical and electronics engineering for the technician(s) who will be assigned to the contract as well as the valid proof of registration with the DoL as installation electrician. Technician must have installation experience.</li> </ul>	20
<b>TOTAL (%)</b>			<b>100</b>

Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 70 % and less than 50 % 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/Rubrics)** for the scoring ranges/rubrics that will be used to evaluate functionality.

### 1.3 Price and Preference Points Evaluation (Phase 3)

Only Bidders that have met meet 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 CONSTRUCTION INDUSTRY DEVELOPMENT BOARD (CIDB)

29.1 Only those tenderers who are registered with the CIDB or are capable of being so prior to the closing date and time of this RFQ submissions, with a grading of **1EP or 1 EB** or **higher** class of construction works, will be considered.

29.2 Joint ventures are eligible to submit proposals provided that:

- Every member of the joint venture is registered with the CIDB;
- The lead partner has a contractor grading designation in the **1EP or 1 EB** or **higher** class of construction work; or not lower than one level below the required grading designation in the class of works construction works under consideration and possess the required recognition status;
- The combined contractor grading designation calculated in accordance with the Construction Industry Development Regulations is equal to **1EP or 1 EB** or **higher** class of construction work.

## 30 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:

- The directors, shareholders or officers of the bidder must not be formally charged of fraudulent or illegal conduct which could harm the CSIR's reputation by associating with the bidder.

## 31 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 winning bidder it will be required from the winning bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: [www.csd.gov.za](http://www.csd.gov.za);
- provide the CSIR of their CSD registration number.

## 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:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
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 <a href="mailto:tender@csir.co.za">tender@csir.co.za</a> . Should tender file size exceed 25MB, bidders submit tender in multiple emails. Use the tender number ..... 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	<a href="mailto:tender@csir.co.za">tender@csir.co.za</a>		E-MAIL ADDRESS	<a href="mailto:tender@csir.co.za">tender@csir.co.za</a>	
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 A 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**

### **For the provision of energy management services to the CSIR for a period of Five (5) years**

#### **CSIR RFP No. 3660/08/11/2024**

#### **1. INVITATION FOR PROPOSAL**

Proposals are hereby invited For the provision of energy management 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 energy management services to the CSIR for a period of Five (5) years

#### **2. 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.

##### **2.1. Technical Proposal**

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

- a. Company profile clearly stipulating the team(s) composition and number of years rendering similar services

- b. The bidder must submit a detailed CV of the Project Manager with a minimum of 5 years' work experience in utilities management and a detailed CV of the Technician with a minimum of 5 years' work experience in electricity meter installation, testing and configuration for automatic meter readings (AMR).
- The bidder must note that the submitted CVs, will be the personnel assigned on the project. In the event that the personnel are not available, the bidder must present a personnel equivalent to what was submitted and evaluated.
- c. Bidders must submit a minimum of three (3) reference letters in energy management services that they have completed between 2015 and 2024. The references submitted must be accessible for vetting.
- d. The bidder must submit a technical proposal and work methodology indicating how they will execute the project:
  - How the audit of the electrical metering EnerMax plus & Landis and Gyr will be carried out and what principles will be applied
  - Information on the communication interface that will be utilised and confirmation of open protocol
  - Example of billing that will be submitted to Facilities Management on a monthly basis (i.e. Tenant billing using sub-meter data)
  - Example of report that will be submitted to Facilities Management on a daily, weekly and monthly basis
  - How queries will be handled from clients on a monthly basis

## 2.2. Financial Proposal

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

- Cover Letter.
- Completed Pricing Schedule (**Annexure D**) on official company letterhead.
- CSD registration report (RSA suppliers only).
- The bidder must submit a valid copy of their B-BBEE certificate or valid sworn affidavit; and registration report (RSA suppliers).

## 3. PROPOSAL SPECIFICATION



### 3.1. Scope of Work

Proposals are hereby invited from suitably experienced Utility Management Companies to provide a full turnkey service on electrical utilities management for the CSIR over a five-year period. The CSIR main site is located in Pretoria and has regional offices located at the following towns:

- Carlow Road – Johannesburg, Gauteng
- Cottlesloe – Johannesburg, Gauteng
- Rosebank – Cape Town, Western Cape
- Stellenbosch – Western Cape
- Durban – KwaZulu Natal
- Kloppersbos – Hammanskraal, Gauteng
- Paardefontein – Hammanskraal, Gauteng

The following services will be performed by the energy management service provider as duties and responsibilities in terms of the specifications provided:

- Linking of the existing electricity meters to an online platform (the service provider must propose an energy management software and online platform to be used in accordance with the client's minimum requirements)
- Management of all electricity performance parameters and liaise with municipalities/Eskom on ad-hoc basis (i.e. main meters and external engagement)
- Management of all electricity performance parameters and tenants on ad-hoc basis (sub-meters and internal engagement)
- Compile internal billing and verify municipal bills on monthly basis
- Meter Maintenance (i.e. technical support)
- Uploading of historical data from the previous service provider and integrating the data to the new system to ensure historical data integrity is sustained
- Analysing consumption data and identifying trends and patterns and reporting back to the client
- Assisting the client with identification of patterns that can lead to decreased energy consumption or load shifting.
- Scrutinizing energy bills and advising the client on actions to undertake.

- Daily monitoring of electricity meters to minimize revenue loss due to offline or defective meters
- Advise on current municipal tariffs and impending NERSA consultation sessions

**Configuration, testing and linking of smart electricity meters to energy management platform**

This will be the initial task to be performed by the service provider on the existing smart electricity meters.

- The service provider must check existing metering installation physically and verify the installation of CTs
- Verify the phasor diagram and CT ratios
- Provide an ADMIN portal to CSIR responsible person with rights to give different levels of access to other personal within CSIR with the capability of giving rights for specific metering points.
- Provide communication interface with open protocol and configure for all meters.
- Portal to have access to profile data and capable of being downloaded when required by CSIR users.
- Replace the sim-card on the existing meters and link all of them to the new platform (Main & Sub-meters to the energy management platform)
- Virtual meters to be created where required to consolidate billing for different clusters within CSIR located in different locations

**Billing and Reporting**

- Verify that usage and billing calculations are accurate and determine whether Electricity bills are processed accurately by the respective municipalities
- Review adequacy and accuracy of meter readings
- Evaluate different tariffs structures from municipalities and recommend the cost-effective tariff for each site to ensure that CSIR procures electricity at the highest economic-efficient price
- Assign appropriate tariffs to the internal client meters and ensure that billing adheres to legislation
- Provide billing to internal clusters and tenants on a monthly basis within the first week of a new month.

- Reconciliation with the main check meter for electricity and all sub meters to be provided within the first week of a new month.
- Assess on a monthly basis the savings generated by the PV plants located on the CSIR premises.
- On ad-hoc basis, assist the CSIR to recover amounts owed by the municipalities
- Compile daily, weekly and monthly reports to assist to CSIR responsible person

#### **Operations/Technical Support**

- Assess meters that are off-line and rectify identified issues.
- Provide technical support on communication interface for electrical metering
- Provide training sessions for staff on using the online monitoring system and interpreting the data
- Develop user manuals and quick reference guides
- Offer ongoing technical support and maintenance services to ensure system reliability

#### **Timelines**

**The bidder must provide a detailed schedule for the following key-activities.**

- Equipment procurement (system hardware and software)
- Installation and configuration
- System integration and testing
- Training and handover
- Support and maintenance

**Annexure C**

**Technical Evaluation Matrix/Rubrics**

**The Provision of energy management services to the CSIR for a period of Five (5) years**

**CSIR RFP No. 3660/08/11/2024**

**Scoring sheet to be used to evaluate functionality**

No.	Criteria	Proof Required	Points Allocation		Weight (%)
1	Company Experience	The bidder must provide a clearly detailed company profile, stipulating the number of years rendering similar services in similar portfolios dealing with Utility Service Providers (Municipalities) and handling similar internal utility groups. Bidder must demonstrate a minimum of 3 years' experience	No submission of company experience or less than 3 years in rendering similar services	0 points	10
			Clearly detailed company profile with 3 to 4 years' experience in rendering similar services in similar portfolios dealing with Utility Service Providers (Municipalities) and handling similar internal utility groups	5 points	
			Clearly detailed company profile with 5 to 7 years' experience in rendering similar services in similar portfolios dealing with Utility Service Providers (Municipalities) and handling similar internal utility groups	7 points	
			Clearly detailed company profile with more than 7 years in rendering similar services in similar portfolios dealing with Utility Service Providers (Municipalities) and handling similar internal utility groups	10 points	
2	Deployment plan and setup	The bidder must submit a detailed deployment plan inclusive of timelines for the following items: <ul style="list-style-type: none"> <li>- Billing System (hardware)</li> <li>- Billing System (software)</li> <li>- Installation and configuration</li> <li>- Data migration from previous provider</li> <li>- System integration and testing</li> <li>- Verification of billing scheme on the meters</li> <li>- Linking all meters to the online platform</li> <li>- Loading historical data on the new platform</li> <li>- Monthly reports setup</li> <li>- Customer training and orientation on the system</li> </ul> Provision of a high-level flowchart of how the metering system works	No submission of timing plan	0 points	20
			More than 30 days required to deploy and implement the system	5 points	
			The system can be deployed within 14 – 30 calendar days	7 points	
			All components of the system can be fully deployed within 14 calendar days	10 points	
3	Billing system capability	The proposed system should be able to fulfill the following functionality: <ul style="list-style-type: none"> <li>- 30 minutes integration</li> <li>- Time stamped data capturing</li> <li>- Less than 12-hour software refresh and update</li> <li>- Daily alerts of meter abnormalities</li> <li>- Billing accuracy</li> <li>- Billing verification</li> <li>- Built-in tariffs specified for each meter</li> </ul>	The proposed system has less than 70% of the required features	0 points	20
			The proposed system has between 70 - 90% of the required features	5 points	
			The proposed system has between 90 - 99% of the required features	7 points	
			The proposed system includes all the required features	10 points	

		<ul style="list-style-type: none"> <li>- Cost breakdown and allocation to multiple clients</li> <li>- Trend analysis</li> <li>- Energy distribution (demand heatmaps) analysis</li> <li>- Hierarchy charts to identify intensive energy users</li> <li>- Unlimited data storage for the duration of the contract</li> </ul>			
<b>4</b>	Client References (Only relevant references)	<p>A minimum of three (3) contactable references letters reflecting the required scope of works (maintenance, repairs and replacement of any plumbing installation and equipment), for services rendered between 2015 and 2024. (<i>Appointment letters, Purchase Orders, Contracts, <b>will not</b> be considered</i>).</p> <p>Reference letters must be for different projects if they are from one client.</p> <ul style="list-style-type: none"> <li>- The references letter must be accessible for vetting.</li> </ul>	No submission of reference letters or less than 3 contactable reference letters	0 points	<b>20</b>
			3 to 4 contactable reference letters	5 points	
			5 to 6 contactable reference letters	7 points	
			> 6 contactable reference letters	10 points	
<b>5</b>	CV of Project Manager	Detailed CV of project manager with a minimum of 5 years relevant experience in utilities management or measurement and verifications.	No submission of CV or with less 5 years' experience	0 points	<b>15</b>
			5 – 7 years' experience	5 points	
			7 – 10 years' experience	7 points	
			> 10 years' experience	10 points	
<b>6</b>	CV of Technician (s)	<p>Detailed CVs of qualified electrical technician with a minimum of 5 years relevant experience in meter installation, testing and configuration and have proven track record in working with Landis + Gyr, Itron, and Honeywell smart meters.</p> <p>The qualified electrical technician must have relevant ORHVS authorization for LV and MV.</p>	No submission of CV or with less 5 years' experience	0 points	<b>15</b>
			5 – 7 years' experience	5 points	
			7 – 10 years' experience	7 points	
			> 10 years' experience	10 points	
<b>TOTAL</b>					<b>100</b>

**Annexure D**

**Pricing Schedule- FIRM PRICES**

**For the provision of energy management services to the CSIR for a period of Five (5) years**

**CSIR RFP No. 3660/08/11/2024**

<b>TABLE 1:</b>								
<b>Section Total Costings</b>								
<b>Description/Trade</b>	<b>Unit</b>	<b>Quantity</b>	<b>Rate</b>	<b>Amount</b>				
Testing, configuration and linking of devices to the new platform	sum	103						
Safety File	item	1						
<b>Total (excl. vat.)</b>								
<b>Total (incl. 15% vat.)</b>								
<b>TABLE 2:</b>								
<b>Section Total Costings</b>			<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>TOTAL</b>
<b>Description/Trade</b>	<b>Unit</b>	<b>Quantity</b>	<b>Rate</b>	<b>Rate</b>	<b>Rate</b>	<b>Rate</b>	<b>Rate</b>	<b>Amount</b>
Year 1 Management fees; Reporting (As per section 3.1 of the RFP); Operations/Technical Support (As per section 3.1 of the RFP)	Monthly	12						

Year 2 Management fees; Reporting (As per section 3.1 of the RFP); Operations/Technical Support (As per section 3.1 of the RFP)	Monthly	12						
Year 3 Management fees; Reporting (As per section 3.1 of the RFP); Operations/Technical Support (As per section 3.1 of the RFP)	Monthly	12						
Year 4 Management fees; Reporting (As per section 3.1 of the RFP); Operations/Technical Support (As per section 3.1 of the RFP)	Monthly	12						
Year 5 Management fees; Reporting (As per section 3.1 of the RFP); Operations/Technical Support (As per section 3.1 of the RFP)	Monthly	12						
Safety File	Item	1						
<b>Total (excl. vat.)</b>								
<b>Total (incl. 15% vat.)</b>								

**Annexure E**

**Proposal Form and List of Returnable Documents**

**For the provision of energy management services to the CSIR for a period of five  
(5) years**

**CSIR RFP No. 3660/08/11/2024**

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 90 [Ninety 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

**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]
Bidder must submit a valid letter of Good Standing relevant to the scope of work, issued by the Department of Employment and Labour, Compensation Fund (COIDA) or any other private insurance firm.		
Bidder must submit proof of registration of a ORHVS authorisation for Electrical/Metering Technician.		
Bidder must submit valid wireman licence as issued by Department of Labour for the Electrical/Metering technician		
In the case of Joint Ventures, bidder must submit a copy of the <b>signed</b> Joint Venture Agreement.		
In the case of subcontracting arrangements, bidder must submit a copy of the <b>signed</b> subcontracting agreement.		
CIDB CRS No.		

### 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
<b>Annexure C:</b> Bidder must submit a Fully completed Pricing Schedule or Bill of Quantities	
<b>Annexure H:</b> Preference Points Award Form in Terms of the Preferential Procurement Regulations 2022 (Mandatory documents to claim preference points) <ul style="list-style-type: none"> <li>• Valid copy of BBEE certificate/ sworn affidavit <ul style="list-style-type: none"> <li>✓ In case of unincorporated trust, consortium or joint venture, they must submit their consolidated B-BBEE scorecard with their <b><u>individual B-BBEE Certificate or Sworn Affidavit</u></b>.</li> <li>✓ In case of sub-contracting both parties must submit copies of their valid BBEE certificates.</li> </ul> </li> </ul> <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 <b>be invalid</b>, the joint venture scorecard will also be invalid.</p>	
Bidder must submit a detailed Methodology and approach	
Bidder must submit reference letters	
Bidder must submit a detailed CV of the project manager	
Bidder must submit a detailed CV of Electrical/Metering Technician with proof of all the required certification	

**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.**

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

<u>OTHER</u> ESSENTIAL RETURNABLE DOCUMENTS	SUBMITTED [Yes/No]
<b>Annexure A:</b> Standard Bidding Document (SBD) 1 Form	
<b>Annexure F:</b> Proposal Form and List of Returnable documents ( <i>This document</i> )	
<b>Annexure G:</b> Certificate of Acquaintance with RFP, Terms & Conditions & Applicable Documents	
<b>Annexure J:</b> Standard Bidding Document (SBD) 4 Form	
<b>Annexure K:</b> RFP Declaration and Breach of Law Form	
<b>Annexure L:</b> Mutual Non-Disclosure Agreement	

<p>A valid and active proof of public liability cover of a minimum of R2 Million Rands or Letter of Intent for cover from an approved insurer. (Proof of Performance Guarantee will not be considered).</p> <p>The preferred bidder must have valid public liability cover prior to being awarded the contract.</p>	
<p>Bidder must submit an IT qualification for the project manager</p>	
<p>Bidder must submit an electrical qualification for the Technician</p>	

**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**

**For the provision of energy management services to the CSIR for a period of five (5) years**

**CSIR RFP No. 3660/08/11/2024**

**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

#### For the Provision of Energy Management Services to the CSIR For a Period of Five (5) Years

#### CSIR RFP No. 3660/08/11/2024

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**

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#### 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).
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included), The lowest acceptable tender will be used to determine the applicable preference point system.

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
<b>Total points for Price and Preference Points must not exceed</b>	<b>100</b>



- 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 points 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<sub>s</sub> = Points scored for price of bid under consideration

P<sub>t</sub> = Price of bid under consideration

P<sub>min</sub> = 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	10
Reconstruction and Development Programme (RDP) Goals <sup>1</sup>	
- Qualifying Small Enterprises( QSE)	10
<b>Total</b>	<b>20</b>

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:

<sup>1</sup> RDP Goals: a. The promotion of South African owned enterprises; b. The promotion of export orientated production to create jobs, c. The promotion of SMMEs; d. The creation of new jobs or the intensification of labour absorption; e. The promotion of enterprises located in a specific province for work to be done or services to be rendered in that province; f. The promotion of enterprises located in a specific region for work to be done or services to be rendered in that region; g. The promotion of enterprises located in a specific municipal area for work to be done or services to be rendered, h. The promotion of enterprises located in rural areas, i. The empowerment of the work force by standardising the level of skill and knowledge of workers; j. The development of human resources, including by assisting in tertiary and other advanced training programmes, in line with key indicators such as percentage of wage bill spent on education and training and improvement of management skills; and k. The upliftment of communities through, but not limited to, housing, transport, schools, infrastructure donations, and charity organizations.

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

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

3.3.1.2. Preferential points for RPD Goals will be awarded as follows:

<b>RDP Goals</b>	<b>% of Preferential points</b>
RDP Goals met	100%
RDP Goals not met	0%

### 3.4. Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture<sup>2</sup> will qualify for preference points as a legal entity (Incorporated), provided that the entity submits its valid B-BBEE certificate. Only valid BBEE 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 BBEE 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 other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

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<sup>2</sup> 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.

**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 and RDP (EMEs) preference points		

**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.

<p>WITNESSES</p> <p>1. ....</p> <p>2. ....</p>
--

<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p>
<p>DATE: .....</p>
<p>ADDRESS.....</p>

## Annexure H

### Standard Bidding Document (SBD) 4

CSIR RFP No. 3660/08/11/2024

#### 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 interest<sup>3</sup> 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.

Full Name	Identity Number	Name of State institution

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

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<sup>3</sup> 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.

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 consortium<sup>4</sup> 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

<sup>4</sup> 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.

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.

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

**For the provision of energy management services to the CSIR for a period of five (5) years**

**CSIR RFP No. 3660/08/11/2024**

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 7 exists, the Respondent is to complete the following section:



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

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Indicate nature of relationship with CSIR:

---

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**[Failure to furnish complete and accurate information in this regard may 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:

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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

### Draft Service Level Agreement



**The provision of energy management services to the CSIR for a period of five (5) years.**

**CSIR RFP No. 3660/08/11/2024**

### **SERVICE LEVEL INDICATORS**

#### **1. INTRODUCTION**

The purpose of the Service Level Indicators is to guide and document the expectations and requirements of the services to be rendered to the Tendering Institutions by the Service Provider.

This document may be used as the benchmark against which reviews and, as appropriate, modifications to the service provided by the Service Provider shall take place.

#### **2. KEY PERFORMANCE INDICATORS**

Key performance indicators (KPIs) are management tools designed to monitor supplier performance and help meet the goals, objectives and service levels of the contract

#### **3. RANGE OF SERVICES**

The services rendered are reflected in the Scope of Work (**Annexure B: Technical Specification**).

#### **4. EMERGENCY WORK**

The work procedure for emergency maintenance projects is therefore as follows:

- a. The service provider must send e-mail notification to the CSIR Project Manager when the faulty meter is detected by the system and be able to provide urgent or emergency services whenever it is required.
- b. The CSIR representative will assess the situation and approach the appointed contractor to attend to the urgent or emergency maintenance work as speedily as possible. The request can be in a form of an email or telephonic call.

- c. The appointed service provider shall follow all statutory provisions and safety rules for carrying out this work including but not limited to SANS 474, NRS 057, NRS096 and the OHS Act, no 85 of 1993.
- d. All work, personnel, materials and equipment shall comply with the relevant SANS specifications and requirements of the Occupational Health and Safety Act of 1993 (Act No. 85 of 1993).
- e. The contractor shall create a safety file for the activities to be performed on site. Safety file shall be submitted to Employer's Agent's or his Representative's for acceptance. The content of the safety file for each activity shall be stipulated by the CSIR's representative.
- f. The contractor will be required to prepare a quotation for the emergency maintenance work done. Quotations submitted for emergency work done, shall be clearly state and quantify work done is an emergency.
- g. After the CSIR representative assessed quotation and agrees with the contents of the quotation, invoices will be paid accordingly.

## **5. ADHOC WORK**

Ad-hoc work includes new meter installation, alteration to existing installation, and replacement.

- a) CSIR representative will compile and submit itemized quotation together with the technical description and scope of ad hoc work required to the appointed contractor.
- b) The contractor must ensure that the requirements stated in the quotation are unambiguous and fully understood prior to preparing the detailed proposal / quotation. A site visit may be required for the contractor to prepare detailed proposal / quotation.
- c) The appointed contractor will submit itemized quotation, a comprehensive quality programme, crafts manhours and the proposed project schedule to the CSIR representative.
- d) The proposal from the appointed contractor will include proposed milestones and cashflow projections.
- e) An official instruction will be issued by the CSIR representative.
- f) No work shall commence if the contractor is not in possession of the following:
  - Official work instruction,
  - Approved Quality Control Plans (QCPs),
  - approved design drawings and SOPs (where applicable).

## 6. MEASUREMENT CRITERIA

The following table lists a comprehensive number of Key Performance Areas:

Key Service Area	Description of Service	Frequency	Measuring Tool	Comment
Online Platform	The service provider must have a 24/7 online portal allowing the CSIR to review the metering data and reports for all meter accounts at any given time.	24/7	Online platform available 24/7 throughout the year for the duration of the contract	
Data Availability	The service provider shall ensure that an online portal is maintained regularly, monitored and have accurate data for all metering points	Monthly	At least 95% of meters remain online throughout the calendar month and any offline meters are resolved within 24 hours	
Data Protection	All metered data and related CSIR reports must be stored in a cloud system to ensure safe protection against any possible disaster	Daily	It is the service providers responsibility to ensure that all metering data is protected and available to CSIR upon request spot checks will be done randomly	
Reporting	The service provider shall provide reports as required and shall avail themselves for any meetings which might be requested by the CSIR.	Daily and Monthly	Status report for all meters that are online/offline must be sent to the CSIR project manager every day and detailed monthly report must be submitted on the 3 <sup>rd</sup> working day of each new month.	
Metering system maintenance	Using trend analysis of meter data and/or machine learning algorithms, the service provider must make accurate predictions of meters that are online <i>but faulty</i> and dispatch a technician within 8 hours to resolve the problem and if the problem relates to communications devices the service provider must repair/replace those components within 24 hours. Failed meters must be reported to the CSIR project manager within 24 hours.	Ad-hoc	All metering related faults must be reported within 8 hours of being detected and resolved within 24 hours	
SHEQ requirements	The service provider shall ensure that they are compliant with the Occupational Health and Safety Act of 1993 (Act No. 85 of 1993).	Everyday	All SHEQ related requirements shall be up do date for the duration of the contract.	

# Annexure J

## Mutual Non-Disclosure Agreement

RFP No. ....

### 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 are 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

- 2.1. The following words and/or phrases, when used in this agreement, shall have the following meanings:
- 2.1.1. "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')
- 2.1.2. "Disclosing Party" shall mean the Party disclosing Confidential Information under this agreement;
- 2.1.3. "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);
- 2.1.4. "Effective Date" shall mean the date of the commencement of this agreement which would be a bid award date";
- 2.1.5. "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";
- 2.1.6. "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");
- 2.1.7. "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

##### 3.1. The Receiving Party undertakes and agrees:

- 3.1.1. to use the Disclosing Party's Confidential Information only to give effect to the Disclosing Purpose;
- 3.1.2. 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;
- 3.1.3. 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;
- 3.1.4. 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;
- 3.1.5. 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;
- 3.1.6. 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

##### 4.1. The Party(ies) undertake(s) to:-

- 4.1.1. comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;
- 4.1.2. treat all Personal Information strictly as defined within the parameters of POPI;
- 4.1.3. 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;

- 4.1.4. process Personal Information in compliance with the requirements of all applicable laws;
  - 4.1.5. 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;
  - 4.1.6. 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
  - 4.1.7. 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.
- 4.2. The Party(ies) undertake(s) to ensure that all reasonable measures are taken to:
- 4.2.1. identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;
  - 4.2.2. establish and maintain appropriate security safeguards against the identified risks;
  - 4.2.3. regularly verify that the security safeguards are effectively implemented;
  - 4.2.4. ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;
  - 4.2.5. 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;
  - 4.2.6. 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;
  - 4.2.7. 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;
  - 4.2.8. 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

- 4.2.9. notify the CSIR, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the CSIR.
- 4.3. 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.
- 4.4. The provisions of clause 4 shall survive the termination of this Agreement, regardless of cause, in perpetuity.

## 5. Exclusions

- 5.1. 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:
- 5.1.1. 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;
  - 5.1.2. it can show was in its possession prior to the earliest disclosure by the Disclosing Party, as evidenced by written documents in its files;
  - 5.1.3. is rightfully received by it from a third party having no obligation of confidentiality to the Disclosing Party;
  - 5.1.4. is independently developed by the Receiving Party by a person(s) who did not have access to the Confidential Information of the Disclosing Party;
  - 5.1.5. is disclosed by the Receiving Party after receipt of written permission from the Disclosing Party; or
  - 5.1.6. 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

- 6.1. The Disclosing Party shall retain ownership of all its Confidential Information as disclosed hereunder.
- 6.2. 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.

6.3. 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

7.1. 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

8.1. 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

9.1. 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

10.1. 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

11.1 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

12.1. 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.

## 13. General

- 13.1. This agreement comprises the entire agreement between the parties concerning the subject matter and supersedes all prior oral and written agreements between them.
- 13.2. 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.
- 13.3. The parties hereby warrant that the officials signing this agreement have the power to do so on behalf of the parties.
- 13.4. 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.
- 13.5. 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.
- 13.6. 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 L: MUTUAL NDA**

**14. Parties to the NDA**

**THE CSIR**, a statutory council, duly established under Act 46 of 1988,

**and**

**The Bidder (Name)**.....

Company 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.

**15. Contact Details for Purposes of Clause 10:**

**15.1. The CSIR**

Physical Address:

Meiring Naude Road

Brummeria

Pretoria

0002

Postal Address:

PO BOX 395

Pretoria

0001

Email: [Tender@csir.co.za](mailto:Tender@csir.co.za)

**The Bidder (Name)**.....

Physical Address: .....

Postal Address: .....

Email: .....

**16. Signature (Bidder):** .....

SIGNED ON THIS THE.....DAY OF.....AT.....

IN THE PRESENCE OF THE FOLLOWING WITNESSES:

1. ....

2. ....