

Request for Proposals (RFP)

The provision of a Situational Analysis of Project, Programme and Portfolio Management Practices in the CSIR

RFP No. 3499/21/01/2022

Date of Issue	Thursday, 09 December 2021	
Briefing Session	None	
Closing Date	Friday, 21 January 2022	
Enquiries and submission of proposals	Strategic Procurement Unit	E-mail: tender@csir.co.za
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

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SECTION A – TECHNICAL INFORMATION

1 INTRODUCTION

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

2 BACKGROUND

The CSIR unveiled its new vision, mission, strategic objectives and focus areas and has just completed its first year of strategy implementation. The thrust of the CSIR's new strategy, is to drive industrial development. The organisation has also implemented new business and operating models to achieve the strategy, including embedding business development and commercialisation as an integral component of its operating model. Other critical organisational changes include having fit for purpose organisational support structures, services, systems, tools and processes that will enable and embed an agile, efficient, effective, integrated and collaborative new way of working.

The CSIR has defined strategic goals that underpin the new strategy. These specific strategic objectives crystallise what the organization must do to achieve growth, sustainability, relevance and impact in their quest to achieve the organization's mandate. These strategic objectives include:

Strategic objective 1: Conduct research and development of transformative technologies and accelerate their diffusion,

Strategic objective 2: Improve the competitiveness of high-impact industries to support South Africa's re-industrialisation by collaboratively developing, localising and implementing technology,

Strategic objectives 3: Drive the socioeconomic transformation through RD&I which supports the development of a capable state,

Strategic objective 4: Build and transform human capital and infrastructure, and

Strategic objective 5: Diversify income, maintain financial sustainability and good governance.

Project, Programme and Portfolio Management (PPPM) is an intrinsic part of the daily activities in all areas of the CSIR. Different approaches have been adopted across the organisation based on the needs and requirements in various areas. This creates challenges in integrating and consolidating the information to develop a high-level overview of the CSIR project activity.

PPPM within the CSIR can be defined as below:

- Project management is the process of managing a team to achieve all project goals on budget on brief and on time
- Programme Management is the process of managing a number of related projects within an organisation
- Portfolio Management is the selection, prioritisation and control of the organisation's programmes and projects, in line with its strategic objectives and capacity to deliver.

The impact of PPPM in the CSIR is illustrated in Figure 1.

Project and programme management is a specific aspect of the day-to-day operational management at various levels in the CSIR.

Portfolio management in the CSIR is an executive level function aimed at ensuring that the CSIR fulfils its mandate, the provisions of the Shareholder Compact, and achieves the goals of the Synapse Strategy as well as the overall CSIR strategy.

Effective Portfolio Management is dependent on the implementation of suitable project and programme management practices and tools that ensure good quality information is cascaded up to Portfolio level.

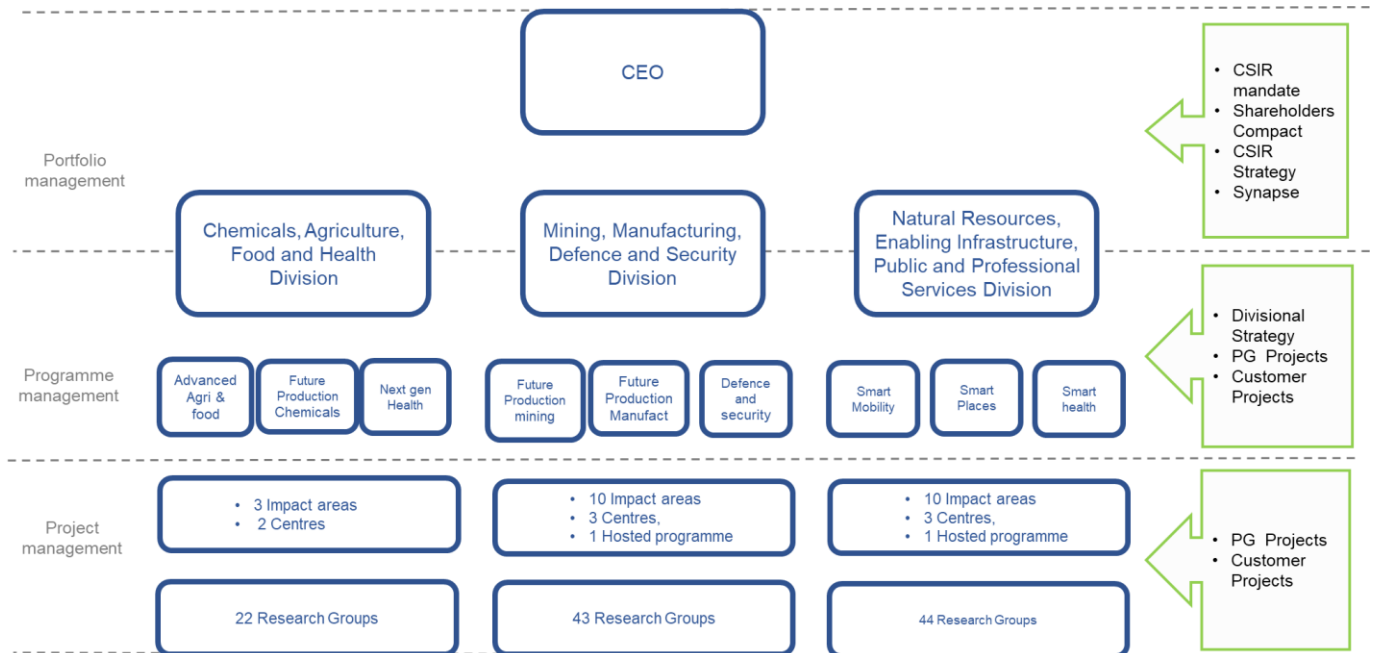


Figure 1 PPPM impact in CSIR

The CSIR has embarked on the development of standard PPPM guidelines based on Project Management Body of Knowledge (PMBOK), PRINCE2 (Projects in Controlled Environments), Project Management Institute (PMI) and similar. These guidelines will need to be further focused and tailored.

Against this backdrop, the PPPM initiative seeks to establish implement and embed a standardised approach to project management in the CSIR:

- Guidelines
- Practices
- Systems
- Tools

Whilst the CSIR will need to further develop and implement its own guidelines and systems, there are a number of software tools available to assist with implementing PPPM. The CSIR's migration to Office 365, opens up the possibility of easily implementing PPPM using Microsoft software.

Formalising and standardising PPPM starts with standardising the approach to project management. Standardised project and programme management will lead to:

- Improved project performance through enhanced project planning.
- Efficient resource utilisation through effective demand and resource allocation management.
- Fostering a culture of collaboration across research groups.
- Better business decision making enabled by enhanced information availability.
- Effective Risk Management and appropriate responses
- Faster implementation turn-around times
- Increased project delivery success through effective project directing and guidance
- Enhanced transparency, accountability and sustainability

For the PPPM initiative to succeed:

- It must easily integrate with the other aspects of the CSIR, with specific emphasis on the tool such as PeopleSoft, and e-Procurement to eliminate duplicate data sets and repetitive inputting of the same data.
- It should be of tangible benefit to Division, Cluster, and Impact Area Managers, as well as Research Group Leaders.
- The CSIR should be committed (resources and time) to completing the process over a number of years.

Once standardised Project Management is established. It will be possible to implement Programme Management in the Clusters, followed by Portfolio management at Group executive level.as illustrated in Figure 2.

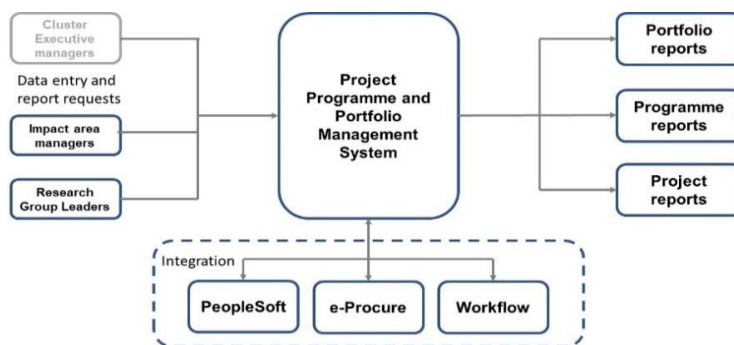


Figure 2: PPPM Concept for CSIR

The PPPM initiative is being conducted in parallel with the Stage Gate project currently being undertaken by the Business Excellence and Integration Portfolio (BEI). These two initiatives are complementary, and when integrated they both will contribute to a better PPPM and Innovation Management practices in the CSIR.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited for undertaking a Situational Analysis of Project, Programme and Portfolio Management practices in the CSIR

The purpose of this Request for Proposal (RFP) is to seek out potential, suitably expert PPPM Consultants to support the CSIR in this initiative.

3.1 SCOPE OF WORK

The Business Excellence and Integration Portfolio (BEI) is seeking the services of an experienced Project Programme and Portfolio Management (PPPM) Consultant to undertake a situational analysis of PPPM practices within the CSIR. The work is aimed at:

- STEP 1
 - Understanding the existing PPPM practices in place at various levels of the organisation
 - Listing the PPPM tools being used in the organisation
 - Understand the information required at project level, and how it can be cascaded upwards to provide the CSIR with an integrated PPPM capability
 - Understanding the linkages between tools used and CSIR systems such as PeopleSoft and eProcurement
 - Identifying the difficulties, bottlenecks and shortcomings, and gaps in the CSIR practices
 - Identifying the areas of PPPM excellence
- STEP 2
 - Develop a high level PPPM framework for the organisation, based on consolidating and updating the existing guidelines and business case.
 - Identify suitable tools and packages for the implementation of the framework.
 - Detail a governance framework that will ensure there is compliance

- Comparing the CSIR practices against those of comparable international institutions. Selected WAITRO members will be approached to share their approach to PPPM.

The work should be completed within three months, including a two-week allowance for the annual shut down at the year end.

The required work is set out below:

3.2 Data collection

Develop a 'status quo' view of the relevant aspects of the CSIR including:

- Attend an MS Teams briefing workshop for CSIR Staff Survey at minimum 150 participants including:
 - Research Group leaders
 - Impact Area Managers
 - Centre Managers
 - Cluster Executive Managers
 - Division Group Executives
 - Research Project Managers
- Identify key PPPM role-players in Divisions and clusters
- Interview key role-players
- Gather examples of tools methods approaches, and processes used (e.g., MS PROJECT, Six Sigma, PMBOK etc)
- Identify and undertake a case study in each division.
- Analyse the data collected:
 - List minimum input requirements
 - List required reporting requirements
 - Areas of excellence
 - Common difficulties, bottlenecks, shortcomings
 - Linkages with CSIR systems
 - Organisational Gap analysis
- Compile a report (MS WORD) setting out the findings
- Present a 'status quo' summary of the findings to BEI (MS PowerPoint)

3.3 Benchmarking

Conduct a benchmarking comparison to understand the approach adopted by similar organisations:

- Undertake an international comparison of CSIR with a minimum of three similar organisations in terms of project management processes and results. Target WAITRO Members, e.g., CSIRO Australia, CSIR India, CARIRI Trinidad and Tobago, Danish Technical Institute Denmark, Fraunhofer Germany.
- Undertake a local comparison of CSIR with selected:
 - Science Councils, e.g., MRC, ARC, MINTEK, etc
 - University Innovation structures, e.g., UP, US, Nelson Mandela, etc
- Compile a report (MS WORD) setting out the findings
- Present a summary of the findings to BEI (MS PowerPoint)

3.4 Review available tools

Review commonly available tools, indicating an ideal solution that fits the CSIR, including:

- Microsoft
 - Teams
 - Project
 - Power BI
- Other, e.g.
 - Monday
 - WRIKE
 - SpiraPlan
 - GamePlan
 - Others
- Consider integration with CSIR systems
- Recommend approach
- Compile report (MS WORD)
- Present a summary of the findings to BEI (MS PowerPoint)

3.5 PPPM Framework

Develop an overview framework for PPPM in the CSIR:

- Define needs

- Projects - Impact area, Centre, and Hosted Programme Managers as well as Research Group Leaders
- Programme - Executive Managers
- Portfolio - Group Executives
- Review and update existing documents:
 - Project Management Guidelines
 - Portfolio Management Guidelines
 - A business case for investing in a PPPM solution
 - Identify gaps
- Integrate Stage Gate approach (part of a parallel project)
- Develop overview Framework
 - Develop a high level PPPM framework for the organisation
 - Framework Document (MS WORD)
- Present the framework and criteria to BEI (MS PowerPoint)

3.6 Design Configuration Document

Compile a design configuration Requirements document for PPPM in the CSIR:

- Select software package(s)
- Define
 - Data inputs required for templates at various levels
 - Data required from CSIR systems
 - Data to be recorded in report templates
- Compile system overview diagram showing
 - System components
 - Data inputs
 - Data flow
 - Conceptual data input templates
 - Conceptual project and programme report outputs
 - Conceptual Portfolio Dashboard options
- Design a governance framework
- Design Configuration Document (MSWORD)
- Present the Design Configuration to BEI (MS PowerPoint)

3.7 Three Year Roadmap

Compile a three-year roadmap for the CSIR journey to design, configure and implement and Integrated approach to PPPM:

- Aims and objectives
- Identification of key actions and initiatives to be implemented, including but not limited to:
 - Final tool selection and procuring software licence(s)
 - Configuration for
 - Project
 - Programme
 - Portfolio
 - Integration with CSIR Systems
 - Piloting in a selected cluster and Impact areas
 - Refinement
 - Roll out to all
 - Divisions
 - Clusters
 - impact Area, Centres, Hosted Programmes and Research Groups
 - Process improvement projects
 - Monitoring evaluation and review
- Project plan indicating:
 - Time scales
 - Key events and initiatives
 - Critical path
 - Required resources
- Roadmap document in MS WORD

3.8 Project plan and inception report

- Prepare a project management plan with timelines, phases, milestones, and resource requirements clearly indicated. A high-level project plan must be submitted as part of the proposal and updated once the project has been initiated.
- Once the project team has engaged with BEI to fine-tune expectations and reviewed the background documentation, an inception report must be drafted by the project team

detailing the overall approach, methodology, expected timeframes, scheduled progress meetings, and deliverables of the project. The inception report will serve as a discussion document and will be the basis upon which the project will proceed.

3.9 EXPECTED DELIVERABLES

The expected deliverables are at a minimum the following:

- 3.9.1 *Project Plan and Inception Report*
- 3.9.2 *Status quo presentation*
- 3.9.3 *Benchmarking report*
- 3.9.4 *Benchmarking presentation*
- 3.9.5 *Available tool Review Report*
- 3.9.6 *Available tool Review Presentation*
- 3.9.7 *Overview Framework Document*
- 3.9.8 *Overview Framework Presentation*
- 3.9.9 *Design Configuration Document*
- 3.9.10 *Design Configuration Presentation*
- 3.9.11 *Roadmap Document*

Note: The reports must be presented in appropriate electronic as well as printed format and must be editable and user-friendly. Minutes and other documents emanating from all meetings are general deliverables throughout the duration of the project.

3.10 PROJECT TIMELINES

It is the requirement of BEI that the inception report and project plan shall be submitted within two weeks of the project commencement date. The project team shall allow for regular reporting and feedback to the BEI.

3.11 BACKGROUND DOCUMENTATION AND PREPARATORY WORK

On appointment, the CSIR will provide the consultant with:

- Contact details of the operation managers within the different divisions to determine the level of employees within the area to be interviewed
- Copies of the relevant CSIR policies, and procedures
- Other documents as deemed appropriate.

4 PROPOSAL SPECIFICATION

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

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

4.1 Technical Proposal

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

- Covering letter.
- Company profile clearly stipulating the number of years rendering similar services.
- Service provider's performance on past and current projects – Provide not less than five (5) contactable client references for similar services provided, clearly stating the position placed, and ability to complete assignments on time.
- Provide a methodology and approach for delivering the required outcomes as outlined in this enquiry.

4.2 Financial Proposal:

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

- Cover letter
- Proposed cost/ commercial offer on official company letterhead.
- The pricing must be firm and inclusive of all costs and disbursements required to render the required services to the CSIR.
- A detailed cost breakdown of the proposed cost in line with scope of work and deliverables.
- Provide a valid original copy of a B-BBEE certificate or valid sworn affidavit confirming B-BBEE status level. The B-BBEE certificate must be SANAS accredited. (Only applicable to RSA companies).

5 FUNCTIONAL EVALUATION CRITERIA

- 5.1 Refer to Annexure A for the scoring sheet that will be used to evaluate functionality.
- 5.2 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of **70 %** and less than **50 %** on any of the individual criteria will be eliminated from further evaluation.

6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Proposals submitted at incorrect location (Bids must be submitted electronically at tender@csir.co.za);

7 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION

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

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

SECTION B – TERMS AND CONDITIONS

8 PROCEDURE FOR SUBMISSION OF PROPOSALS

- 8.1 All proposals must be submitted electronically to tender@csir.co.za.
- 8.2 Respondents must use the RFP number as the subject reference number when submitting their bids.
- 8.3 The e-mail and file sizes should not exceed a total of 25MB per e-mail.
- 8.4 The naming/labeling syntax of files or documents must be short and simple (e.g., Product Catalogues).
- 8.5 All documents submitted electronically via e-mail must be clear and visible.
- 8.6 All proposals, documents, and late submissions after the due date will not be evaluated.
- 8.7 Documents submitted via cloud (i.e., drop box, WeTransfer, Google Drive) will not be considered.

NB: NO HARD COPIES OR PHYSICAL SUBMISSIONS WILL BE ACCEPTED

9 TENDER PROGRAMME

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

- Issue of tender documents: 09 December 2021
- Closing / submission Date: 21 January 2022

10 SUBMISSION OF PROPOSALS

- 10.1 All proposals are to be submitted electronically to tender@csir.co.za. No late proposals will be accepted.
- 10.2 Responses submitted by companies must be signed by a person or persons duly authorised.
- 10.3 All e-mailed proposal submissions are to be clearly subject referenced with the RFP number. Proposals must consist of two parts, each of which must be sent in two separate e-mails with the following subject:
 - PART 1:** Technical Proposal- RFP No.: 3499/21/01/2022
 - PART 2:** Pricing Proposal- RFP No.: 3499/21/01/2022
- 10.4 The CSIR will award the contract to qualified tenderer(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price, and B-BBEE.

10.5 Proposals submitted must be in the following file formats:

- PDF

11 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the e-mail address mentioned above no later than the closing date of **Friday, 21 January 2022**, during CSIR's business hours. The CSIR business hours are between 08h00 and 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated e-mail address, it will be regarded as a late submission. Late submissions will not be considered.

12 AWARDING OF TENDERS

12.1 Awarding of tenders will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

13 EVALUATION PROCESS

13.1 Evaluation of proposals

An evaluation team will evaluate all proposals for functionality, price, and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderer/s.

A two-phase evaluation process will be followed:

13.1.1 The first phase includes the evaluation of elimination and functionality criteria.

13.1.2 The second phase includes the evaluation of price and B-BBEE status.

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

13.2 Preference points system

The 80/20 preference point system will be used where 80 points will be dedicated to pricing and 20 points to B-BBEE status. If all tenders received are more than R50m, the proposal will be cancelled and re-issued.

14 PRICING PROPOSAL

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

**Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;*

***Non-firm price is all prices other than "firm" prices.*

15 VALIDITY PERIOD OF PROPOSAL

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

16 APPOINTMENT OF SERVICE PROVIDER

- 16.1** The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.
- 16.2** 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.
- 16.3** Awarding of contracts will be announced on the National Treasury website, and no regret letters will be sent to unsuccessful bidders.

17 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry regarding this RFP shall be submitted in writing to CSIR at tender@csir.co.za with **RFP No: 3499/21/01/2022 – “The provision of a Situational Analysis of Project, Programme and Portfolio Management Practices in the CSIR”** subject.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

18 MEDIUM OF COMMUNICATION

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

19 COST OF PROPOSAL

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

20 CORRECTNESS OF RESPONSES

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

21 VERIFICATION OF DOCUMENTS

- 21.1** Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. The CSIR will accept no liability concerning anything arising from the fact that pages are missing or duplicated.
- 21.2** Only one electronic copy of the proposal (Technical and Financial) must be submitted via e-mail to tender@csir.co.za. If the bidder sends more than one proposal, the first submission shall take precedence should it not have been recalled/withdrawn in writing by the bidder. Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate e-mail and no such information should be available in the technical proposal.

22 SUB-CONTRACTING

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

23 ADDITIONAL TERMS AND CONDITIONS

- 23.1** A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.
- 23.2** Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 23.3** In case of proposal from a joint venture, the following must be submitted together with the proposal:
- Joint venture Agreement including split of work signed by both parties;
 - The original or certified copy of the B-BBEE certificate of the joint venture;
- 23.4** 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.
- 23.5** Failure to comply with any of the terms and conditions as set out in this document will invalidate the proposal.

24 CSIR RESERVES THE RIGHT TO

- 24.1** Extend the closing date;
- 24.2** Verify any information contained in a proposal;
- 24.3** Request documentary proof regarding any tendering issue;
- 24.4** Give preference to locally manufactured goods;
- 24.5** Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
- 24.6** Award this RFP as a whole or in part;
- 24.7** Cancel or withdraw this RFP as a whole or in part.

25 DISCLAIMER

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning

the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

DECLARATION BY TENDERER

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

RFP No: 3499/21/01/2022

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in **RFP No. 3499/21/01/2021** at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

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

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

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

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

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

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES	
1
2
DATE:	

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

The bidder must provide details of the bidder's current experience in providing similar services. Only references for work done in the past 5 years must be provided.

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

27 ANNEXURE A: FUNCTIONAL EVALUATION CRITERIA SCORING SHEET

No.	Criteria	Proof required	Weight	0	5	7	10
1	Proven years specialist PPPM Consulting experience	Schedule of experience and similar projects	20%	No Track record of company experience in the related field	5 years + experience in the related field	10 years + experience in the related field	20 years + experience in the related field
2	Proven track record of successful completed PPPM consulting work for RD&I organisations	Schedule of experience with similar projects and client references	15%	No track record and references for successful completion of PPPM consulting in RDI organisations	At least 2 references for successful completion of PPPM consulting in RDI organisations	At least 4 references for successful completion of PPPM consulting in RDI organisations	At least 7 references for successful completion of PPPM consulting in RDI organisations
3	Suitable list of Organisations selected for benchmarking	List of organisations suitable for comparison with CSIR	15%	None	One	Two	Three
4	Proposed Team Capability with a Project manager with minimum 5 years' experience and a team with a variety of relevant experience.	Detailed CV(s), indicating the number of years of experience the project team has on similar projects	20%	Project manager and team with no experience	Project manager with 5 + years' experience in PPPM consulting	Project manager with 7 + years' experience in PPPM consulting	Project manager with 10 + years' experience in PPPM consulting
5	Technical approach and methodology including a step-by-step process to be followed to deliver the project	Methodology, Deliverables and timelines provided in line with the required outputs of the project	30%	No clear technical approach and methodology	Methodology inclusive of detailed, step by step data gathering and analysis with clear timelines	Methodology inclusive of detailed, step by step data gathering and analysis with clear timelines and clear execution strategy with possible project risks.	Clearly defined Methodology with the following: <ol style="list-style-type: none"> 1. Technical approach 2. Clear steps of data gathering, 3. Clear method of data analysis and approach 4. Defined timelines
	Total Points		100%				

28 ANNEXURE B: PRICING SCHEDULE

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

No.	Deliverable / Item Description	Unit of Measure	Quantity	Unit Price (Excl. VAT)
1	Project Plan and Inception Report	Each	1	
2	Status Quo presentation	Each	1	
3	Benchmarking report	Each	1	
4	Benchmarking presentation	Each	1	
5	Available Tool Review Report	Each	1	
6	Available Tool Review Presentation	Each	1	
7	Overview Framework Document	Each	1	
8	Overview Framework Presentation	Each	1	
9	Design Configuration Document	Each	1	
10	Design Configuration Presentation	Each	1	
11	Roadmap Document	Each	1	
12	Disbursements and other fees	Each	1	
			Sub-total	
			VAT	
			Total	

Notes to Pricing:

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

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

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

29 ANNEXURE C RETURNABLE CHECKLIST

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

The bidder must complete the following returnable documents:

RETURNABLE DOCUMENTS –		
PART A: TECHNICAL RETURNABLES		
ONE ELECTRONIC COPY		
Description:	Included	
	Yes	No
Cover Letter		
Technical Proposal detailing: <ul style="list-style-type: none"> • Proven years of company experience specialising in PPPM Consulting work. • Proven track record of successful PPPM Consulting work for RD&I organisations. • Proven access to required information from credible list of organisations selected for benchmarking. • Proposed Team Capability with a Project Manager possessing a minimum 5 years' experience and a team with a variety of relevant experience. • Technical approach and methodology including a step-by-step process to be followed to deliver on the assignment of years the company has been providing similar services • Team Leader's experience (number of years) in managing assignments similar to the scope of this RFP • CVs of proposed Team. 		
References <ul style="list-style-type: none"> • Complete the reference information section on page 22, section 27 		
Completed bidder declaration		
PART B: PRICING PROPOSAL		
ONE ELECTRONIC COPY		
32	Pricing Proposal	
33	B-BBEE Certificate	
34	Completed SBD1 Form	