



Request for Proposals (RFP)

The provision of professional services to the CSIR to develop a manufacturing innovation strategy and transition roadmap aligned with the new CSIR organisational strategy – Top-down approach

RFP No. 1027.1/15/11/2022

Date of Issue	Tuesday, 01 November 2022	
Closing Date	Tuesday, 15 November 2022	
Place of tender submission	Electronic submission: tender@csir.co.za Mail size is limited to 25MB, if the document exceeds this limit, please send multiple emails. Cloud submissions will not be accepted	
Enquiries	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. The CSIR has nine Clusters including Advanced Agri and Food, Chemicals, Defence and Security, Manufacturing, Mining, NextGen Enterprises and Institutions, Next Gen Health, Smart Logistics as well as Smart Places.

The fourth industrial revolution is significantly impacting competitiveness. The digitalisation of industry is characterised by technology convergence that is impacting the way data is organised, analysed and shared. This includes the migration of services into the cloud via apps; data collection and integration enabled by the Internet of Things; big data, trend and optimisation analyses powered by artificial intelligence; and mobile computing supporting AR/VR human enhancement.

These trends have become increasingly evident in the priority focus sectors of the Manufacturing Cluster, which are:

- Metals, Machinery & Mining Equipment
- Automotive
- Health (Medical Devices)
- Aerospace & Defence

The Manufacturing Cluster is transitioning to an updated strategy that will see the development of capabilities relevant to current industry requirements around 4IR. Based on current industry trends, the cluster's strategic goal and objectives are to use digital transformation and 4IR technologies to contribute towards the re-industrialisation of South African manufacturing industries.

2 BACKGROUND

The CSIR Manufacturing Cluster is seeking the support of a globally reputable strategy innovation and adoption firm with the following demonstrated track record.

- Deep level understanding on the challenges and gaps faced by the local and global manufacturing industry with regards to aspects of economic competitiveness, efficiencies, trends in technology and innovation
- Demonstrated experience with adoption of technologies which includes the development of an innovation culture and transformation. These should include technology strategies that addresses and supports ESG (Environmental, Social, and Corporate Governance) drivers in manufacturing
- Experience in developing ecosystem strategy roadmaps
- Experience with venture capital, innovation and start-up companies
- Demonstrated stakeholder relations management which includes private, public and government partnerships
- Diverse experience with industries that are aligned to the priority areas identified above
- Demonstrated experience with accustomed to handling sensitive information
- Systems thinking capability

Support is required to develop a Manufacturing Cluster Innovation strategy and transition roadmap that identifies the R&D needs of the industry that advise the establishment of critical capabilities and technologies. The roadmap has to make recommendations on the most suitable implementation of a strategy, including, but not necessarily limited to business models, capabilities, technologies, supporting functions, systems, processes, tools and other elements where appropriate, in line with global best practice. A critical outcome of the roadmapping process is the engagement between CSIR, government and industry stakeholders to achieve shared understanding of a vision and objectives. This must be kept in mind to all parties intending to submit a response to this RFP.

3 INVITATION FOR PROPOSAL

Proposals are hereby invited for the supply of professional services to the CSIR to develop a Manufacturing Innovation strategy and transition roadmap aligned with the CSIR organisational strategy.

4 PROPOSAL SPECIFICATION

The CSIR requires support from a service provider/s for the following services relating to Manufacturing Innovation strategy development.

1. General assessment of global trends within the CSIR prioritised (Automotive, Mining, Medical Devices, Aerospace & Defence, Industrial Equipment) manufacturing sectors with a special focus on BRICS and Africa, specifically including relevant South African sector master plans
2. Development of a set of criteria for prioritising and selecting sub sectors that have potential for high impact technology interventions
3. Development of a methodology, with explicit reference sources, to continuously update the trend and prioritisation assessment
4. Detailed trend assessment and value chain analysis (incl. potential shifts in the value chains over time) for the prioritised local manufacturing sub sectors and identify differences, if any, to the global value chains for these sub sectors. Assessment to look at a 5-10 year time horizon
5. Identify gaps in the RSA advanced manufacturing sector innovation system based on the value chain analysis
6. Identify competitiveness gaps in each of the CSIR prioritized manufacturing sectors
7. Identify barriers to uptake of advanced manufacturing and 4IR related technologies and systems (technology diffusion) in the prioritised manufacturing sub sectors and indicate which elements of the value chain the technologies contribute towards
8. Identify best practices internationally for increasing uptake of digital transformation and 4IR technologies within the priority manufacturing sub sectors (including production technology, supply chain integration & management technology and business process technology) and indicate which elements of the value chain these technologies contribute towards
9. Map the local industry landscape to the relevant value chains and indicate their turnover and BBBEE levels
10. Identify potential technologies, products, and RD&I services that CSIR should consider developing for addressing the gaps and innovation needs of the local industry landscape for the priority sectors according to its value chain
11. Identify international and local technology and implementation leaders that CSIR can potentially partner with to close the identified gaps

12. Based on the complete assessment above, identify the RD&I capabilities that CSIR needs to have to address the identified gaps. An estimation of the capacity of these capabilities is also required with the assumptions on which the estimation is based clearly articulated

Important considerations for the development of the roadmap:

- “RD&I capabilities” is understood to include relevant 1) methodologies, processes, procedures and techniques, 2) modelling and simulation infrastructure, 3) test and evaluation infrastructure, 4) laboratories, and 5) skills and expertise of staff.
- ESG (Environmental, Social, and Corporate Governance) drivers in manufacturing must be built into the proposal
- The roadmap is an “industry-driven” roadmap focussing on the needs of the industry
- A critical outcome of the road mapping process is the engagement between CSIR, government and industry stakeholders to achieve shared understanding of a vision and objectives.
- The CSIR team will be part of the roadmap and strategy development process with the target stakeholder base.
- The final product is required 3-4 months after appointment of the successful bidder.

5 DELIVERABLES

The following key deliverables are required as outcomes of this work:

1. A detailed report documenting the analysis and culminating into a Feasibility-Potential Return/Impact assessment of identified opportunities (all references used must be captured)
2. A detailed capability and offering transition roadmap with RDI project pipeline and implementation plan to transition CSIR from its current Manufacturing Innovation Support RD&I state to the desired future state.
3. A qualitative assessment between the analysis and the draft CSIR Manufacturing cluster strategy and business plan. Recommendations for improvement of the draft CSIR Manufacturing cluster strategy and business plan must be provided – in the context of the CSIR mandate and strategic intent

6 TIMELINE

The final product is required approximately 3-4 months after appointment of the successful bidder.

7 EVALUATION CRITERIA

The evaluation of the proposal will be based on the criteria and scoring in Table 1 below.

Table 1: Criteria and scoring matrix

No.	Criteria	Proof required	Points allocation	Weight
1	<p>Team Innovation Strategy Development and Strategy Implementation/Adoption Experience:</p> <p>The team must have a demonstrated experience, in successfully drafting innovation strategies and roadmaps drawing together multiple parties across public and private sectors.</p> <p>The team must have evidence/testimonials that demonstrate strategy implementation and learnings thereof.</p> <p>The team must present evidence/testimonials that demonstrate that strategies previously developed were implemented, adopted and achieved success.</p> <p>The team leader must have <u>not less than 10 years'</u> experience in strategic innovation management interventions. Experience in working with organisations similar in nature to the CSIR in the past 5 years with successful innovation related interventions would be a strong advantage.</p>	<p>Company Profile explicitly indicating the number of years the company has been providing innovation strategy related services and to which organisations. Level of experience of leader clearly articulated.</p> <p>Examples of success stories demonstrating experience and successful outcomes.</p>	<p>(i) Organisations experience totally unaligned to CSIR requirements OR (ii) business and experience of team leadership < 8 years OR (iii) no demonstrable experience in drafting and implementing innovation strategies for organisations similar to CSIR in the past 5 years - 0 points</p> <p>Company profile indicates company has 8-10 years' experience in innovation strategy related processes – 5 points</p> <p>Company profile indicates company has between 11-15 years' experience in managing innovation strategy processes successfully with a solid track record demonstrated –7 points</p> <p>Company profile indicates company has in excess of 15 years' experience in managing innovation strategy processes successfully with an extensive track record and success stories with significant industry members in the manufacturing and related industries – 10 points</p>	20%

No.	Criteria	Proof required	Points allocation	Weight
2	<p>RSA Manufacturing Sector and sub-sector experience</p> <p>The onsite team assigned to the CSIR must have demonstrated knowledge and insights into the RSA manufacturing industry through direct involvement with manufacturing innovation project implementations in South Africa</p> <p>-Experience across the value chain including supply chain is required</p>	<p>Examples of strategic engagements with RSA manufacturing companies demonstrating experience and successful outcomes in RSA manufacturing including experience across the value chain in various commodity sectors.</p>	<p>No demonstrable experience in the RSA manufacturing sector with manufacturing innovation project implementations – 0 points</p> <p>Successful innovation projects in one of the identified priority sectors – 5 points</p> <p>Successful innovation projects in two to three of the identified priority sectors -7 points</p> <p>Successful innovation projects in all of the identified priority sectors – 10 points</p>	20%
3	<p>International manufacturing technology state of the art knowledge</p> <p>The team assigned to the CSIR must have demonstrated knowledge and insights into state of the art application of technology in manufacturing and related industries and the technology trends impacting on these, specifically the 4th Industrial Revolution foundational technologies for top manufacturing companies</p>	<p>Examples of projects with customers where knowledge of the state-of-the-art was developed and/or mobilised to the benefit of customers</p>	<p>Assigned team to CSIR does not have demonstrable knowledge and insight into manufacturing state-of-the-art application of technology in manufacturing and related industries, specifically the 4th industrial revolution foundational technologies – 0 points</p> <p>1-3 technology investigations or trade-study projects, technology forecasting or foresight projects in manufacturing and related industries, limited technology scope – 5 points</p> <p>4-6 technology investigation or trade-study projects in manufacturing and related</p>	20%

No.	Criteria	Proof required	Points allocation	Weight
			<p>industries, or technology forecasting or foresight projects some with broad technology scope – 7 points</p> <p>> 6 technology investigation or trade-study projects in manufacturing and related industries, each with broad technology scope, as well as technology forecasting or foresight projects – 10 points</p>	
4	<p>Manufacturing operations modernization strategy and plan development experience</p> <p>The specific onsite team assigned and committed to the CSIR must have demonstrated knowledge and insights into practical manufacturing operations modernization programs and roadmaps and lessons learnt from actual manufacturing operations modernization programs</p>	<p>Examples of manufacturing operations modernization roadmap development and implementation success stories demonstrating experience and successful outcomes.</p>	<p>Onsite team dedicated to CSIR has no manufacturing operations modernization roadmap development and implementation success stories – 0 points</p> <p>Onsite team dedicated to CSIR has experience in 1-3 manufacturing operations modernization roadmap development and implementation success stories – 5 points</p> <p>4-6 manufacturing operations modernization roadmap development and implementation success stories – 7 points</p> <p>> 6 manufacturing operations modernization roadmap development and implementation success stories – 10 points</p>	20%

No.	Criteria	Proof required	Points allocation	Weight
5	<p>Methodology, approach, tools and technical proposal</p> <p>The service provider must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in the proposal specification section of the document.</p> <p>An understanding of the CSIR and its strategy, role and mandate is required.</p> <p>A detailed approach, methodology and plan on how they will assist CSIR in achieving the objectives of this request must be provided, including an outline of the project deliverables and artefacts, indicating key milestones and turnaround times.</p>	Detailed Methodology, Approach and clear project plan/ Gantt Chart/timelines etc.	<p>Non-submission or proposal does not address the scope of the assignment – 0 points</p> <p>Approach is very generic. The bidder’s proposal addresses and meets minimum or basic project requirements. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder understand the requirements. – 5 points</p> <p>Approach is specifically tailored to suit the CSIR’s requirements. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities demonstrate that the bidder clearly understand the requirements and has a good understanding of the needs of the CSIR. – 7 points</p> <p>The approach is innovative and more than exceeds the expectations of the CSIR. The work plan and timeframes meet the requirements of the assignment, the sequencing of activities indicate the bidder has an excellent or demonstrated in-depth understanding of the requirements of the CSIR and of the issues that they are faced with – 10 points</p>	20%
	Total			100%

- 7.1 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 50% and/or less than 50% on any of the individual criteria will be eliminated from further evaluation.
- 7.2 The scoring sheet in Table 1 will be used to evaluate functionality.

8 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline.
- Proposals submitted at an incorrect email address.
- Bidders that are registered on the National Treasury Register of Tender Defaulters
- Incomplete proposal submission
- National Treasury Restricted suppliers
- Failure to submit fully completed and signed SBD 4 and SBD 1.

9 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 of their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process. (The B-BBEE requirement only applies to RSA suppliers only).

SECTION B – TERMS AND CONDITIONS

10 VENUE FOR PROPOSAL SUBMISSION

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

11 TENDER PROGRAMME

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

- Issue of tender documents: Tuesday, 01 November 2022
- Last date for submission of queries: Tuesday, 08 November 2022
- Closing / submission Date: Tuesday, 15 November 2022

12 SUBMISSION OF PROPOSALS

12.1 All proposals are to be clearly marked with the RFP number. Proposals must consist of two parts clearly marked:

PART 1: Technical Proposal: RFP No.: 1027.1/15/11/2022

PART 2: Pricing Proposal, B-BBEE and other Mandatory Documentation:

RFP No.: 1027.1/15/11/2022

12.2 Proposals submitted by companies must be signed by a person or persons duly authorised.

12.3 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.

13 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **Tuesday, 15 November 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 place, it will be regarded as a late tender. Late tenders will not be considered.

14 AWARDING OF TENDERS

14.1 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.

15 EVALUATION PROCESS

15.1 Evaluation of proposals

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

A two-phase evaluation process will be followed.

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

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

15.2 Preference points system

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

16 PRICING PROPOSAL

16.1 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.

16.2 Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.

16.3 Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.

16.4 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.

**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.*

16.5 Payment will be according to the CSIR Payment Terms and Conditions.

17 VALIDITY PERIOD OF PROPOSAL

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

18 APPOINTMENT OF SERVICE PROVIDER

18.1 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.

18.2 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.

18.3 Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

19 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 1027.1/15/11/2022 - The provision of professional services to the CSIR to develop a manufacturing innovation strategy and transition roadmap aligned with the new CSIR organisational strategy – TOP-DOWN APPROACH"** as the subject.

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

20 MEDIUM OF COMMUNICATION

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

21 COST OF PROPOSAL

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

22 CORRECTNESS OF RESPONSES

22.1 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.

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

23 VERIFICATION OF DOCUMENTS

23.1 Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.

23.2 Electronic copy of each proposal must be submitted.

23.3 Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.

24 SUB-CONTRACTING

- 24.1 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.
- 24.2 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.

25 ENGAGEMENT OF CONSULTANTS

The consultants will only be remunerated at the rates:

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

26 TRAVEL EXPENSES

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

27 ADDITIONAL TERMS AND CONDITIONS

- 27.1 A 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.
- 27.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.
- 27.3 In case of proposal from a joint venture, the following must be submitted together with the proposal:
- Joint venture Agreement including split of work signed by both parties;
 - The original or certified copy of the B-BBEE certificate of the joint venture;
 - The Tax Clearance Certificate of each joint venture member;
 - Proof of ownership/shareholder certificates/copies; and
 - Company registration certificates.
- 27.4 An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.
- 27.5 Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

28 CSIR RESERVES THE RIGHT TO

- 28.1 Extend the closing date;
- 28.2 Verify any information contained in a proposal;
- 28.3 Request documentary proof regarding any tendering issue;
- 28.4 Give preference to locally manufactured goods;
- 28.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);
- 28.6 Award this RFP as a whole or in part;
- 28.7 Cancel or withdraw this RFP as a whole or in part.

29 DISCLAIMER

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, 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: 1027.1/15/11/2022

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 1027.1/15/11/2022 at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

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

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

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

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

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

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES	
1
2
DATE:	