# Request for Proposals (RFP)

## The Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years.

## RFP No. 3788/27/11/2026

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| Date of issue | Tuesday, 10 November 2026 |
| Last date for submission of enquiries/clarifications | Tuesday, 24 November 2026 @ 16h30 |
| Closing Date and Time | Friday, 27 November 2026 @ 16h30 (late submissions will not be accepted) |
| RFP Validity Period | 120 calendar days (Commencing from the RFP closing date) |
| Enquiries and submission of Proposal | Click here for Queries and Submission |
| Electronic Submission | Maximum file size (per file) is 20MB that can be uploaded.<br><br>The Electronic Bid Submission portal (EBSP) automatically rejects late entries. Bidders must upload all documents early to accommodate large file sizes and network speeds. CSIR accepts no liability for system traffic, bandwidth issues, or technical failures experienced during submission. |
| Guide on how to register on the CSIR Electronic Bid Submission Portal | SUPPLIER REGISTRATION USER GUIDE.<br>WATCH THE VIDEO DEMONSTRATION |

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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 – Terms of Reference/Technical Specification/Scope of Services
- Annexure C – Technical Evaluation Matrix/Rubrics
- Annexure D – Pricing Schedule
- Annexure E – Proposal Form and List of Returnable Documents
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- Annexure H – Standard Bidding Document (SBD) 4 Form
- Annexure I – RFP Declaration and Breach of Law Form
- Annexure J – Mutual Non-Disclosure Agreement
- Annexure K – Draft Service Level 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 through CSIR Electronic Bid Submission Portal.

2.2 All proposals will only be considered if received by the CSIR before the closing date and time (***as indicated on the cover page***).

2.3 All proposal submissions are to be clearly subject-referenced with the **RFP number and RFP Description**. Proposals must consist of three parts, each of which must be sent in three separate folders.:

2.3.1 **Mandatory Repository**: Mandatory Returnable Documents (Annexure E).:

2.3.2 **Technical and Other Essential Repository**: Technical Proposal: and other essential documents (Annexure E).

2.3.3 **Pricing and B-BBEE Repository**: Pricing Proposal, Preference Points Award Form, Valid B-BBEE Certificate or Sworn Affidavit and any other relevant document to claim preference points (Annexure E).

2.4 Maximum file size (per file) is 20MB that can be uploaded.

2.5 Documents submitted with links to cloud solutions such as: WeTransfer, Google Drive, Dropbox, etc. will not be considered.

2.6 The naming / labelling syntax of files or documents must be short and simple, up to fifty (50) characters.

2.7 The CSIR Electronic Bid Submission Portal does not accept late submissions, bidders are required to ensure that electronic bid submissions are done timely before the closing date and time to prevent issues which they may encounter due to their internet speed, bandwidth or the size of the number of uploads they are submitting. The CSIR will not be held liable for any challenges experienced by bidders as a result of the technical challenges. Please do not wait for the last hour to submit.

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

2.9 Proposals submitted at incorrect location or address, will not be accepted for consideration.

2.10 All dates and times in this bid are South African standard time.

2.11 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.

2.12 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, *inter alia* 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 Master agreement 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 principles of broad-based black economic empowerment and recognises that meaningful empowerment, fair competition and sound public procurement can only be achieved where bidders, contractors, individuals and businesses conduct themselves in a manner that is consistent with the Constitution of the Republic of South Africa and in an honest, fair, equitable, transparent and legally compliant manner. Against this background, the CSIR condemns any form of fronting, fraud, misrepresentation, false declaration or the submission of information, documents or claims that are misleading, inaccurate or not credible, including but not limited to claims relating to experience, qualifications, capacity, resources, quality, certifications, ownership, subcontracting arrangements, local content, compliance status or any other material aspect of a bid or contract.

4.2 The CSIR reserves the right, at any stage of the procurement process or during the life of any resulting contract, to verify, investigate or require substantiation of any representation, statement, document or claim made by a bidder or contractor, whether relating to fronting or to any other material aspect of the bid or contract, including experience, past performance, qualifications, technical capability, quality standards, resources, personnel, certifications, pricing, ownership, subcontracting arrangements and legal or regulatory compliance. If the CSIR determines, or has reasonable grounds to believe, that any such information is false, misleading, inaccurate, fraudulent, non-credible or constitutes fronting or any other material misrepresentation, the CSIR may, in addition to any other rights or remedies available in law, disqualify the bidder, reject the bid, terminate negotiations, cancel the award, cancel or terminate the contract, recover any losses or damages suffered, report the matter to the relevant authorities, and take steps to restrict or bar the bidder or contractor from doing future business with the public sector or with the CSIR, subject to applicable law. The CSIR may further take such conduct into account in assessing the bidder’s or contractor’s integrity, reliability and suitability in any future procurement process.

## 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 rate of exchange (ROE) used in the quotation must be clearly indicated. For prices subject to ROE variations, bidders must indicate the ROE used by 12:00 p.m. (South African Time) on the date of issuing this tender. Bidders must also indicate the source of ROE used. The bidder must provide a total cost breakdown and escalation formula.

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 The CSIR does not ordinarily provide advance or upfront payments. However, where a bidder requests an advance or upfront payment and the CSIR, at its sole discretion, agrees to such request, the CSIR reserves the right to require the bidder to furnish an Advance Payment Guarantee from a recognised financial institution acceptable to the CSIR. The value, format, terms, and duration of the guarantee shall be determined by the CSIR and must provide adequate security for the full amount of the advance payment. Failure to provide the required guarantee may result in the rejection of the advance payment request or termination of contract negotiations.

5.6 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.**

5.7 For international quotations, suppliers are requested to provide pricing on a DAP (Named Place of Destination) Incoterms® 2020 basis to enable a fair comparison of total landed cost, including transport, export duties, if applicable, and delivery. Quotations should include a clear cost breakdown, showing where applicable:

- Ex-works (EXW) price of the goods
- Inland cost, e.g., transport and export clearance and handling up to FCA point

- International freight (CPT or equivalent)
- Insurance, if arranged by the supplier

**Final delivery** to destination (DAP)The Buyer maintains an **open marine insurance policy** covering shipments; suppliers are not required to provide separate insurance unless specifically requested.

Prior to contract award, the Buyer reserves the right to confirm or amend the final delivery term to **FCA (Named Place of Delivery) Incoterms®2020, or any Incoterm up to DAP, or another mutually agreed Incoterm**, depending on operational efficiency and best practice.

Quotations will be evaluated based on **total landed cost, delivery reliability, compliance with export/import requirements, technical conformance, and supplier capability**. The contract will be awarded to the quotation representing the **best overall value**, which may not necessarily be the lowest price.

## 6 APPOINTMENT OF SUPPLIER OR 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 supplier or 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 or service provider.

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 K) 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 proposed amendment;

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.

7.4 Timeous finalisation of this agreement will be an absolute pre-condition to the recommended bidder’s appointment to provide goods or services to the CSIR.

7.5 If the recommended bidder(s) fails to sign the proposed agreement within the time frame stipulated, CSIR reserves the right to:

7.5.1 cancel the award to the recommended bidder;

7.5.2 enter into negotiations with the second ranked bidder(s) and conclude the proposed agreement with such second ranked bidder(s); or

7.5.3 take any other action CSIR deems reasonable and appropriate.

## 8 ENQUIRIES AND CONTACT WITH THE CSIR

Any enquiry or query regarding this RFP shall be submitted via the EBSP - Click here for Queries and Submission in writing to CSIR in the format outlined in the table on the cover page of this RFP document.

Any other contact with CSIR personnel, whether involved or not in this tender (about this tender process) 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 language.

## 10 CORRECTNESS OF RESPONSES

10.1 The bidder must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and/or rates quoted cover all the work/items specified in the RFP. The prices and/or rates quoted must cover all obligations under any resulting contract.

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

## 11 VERIFICATION OF DOCUMENTS

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

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

## 12 PRE-COMMENCEMENT PHASE

In order to allow for a smooth transition of handover of obligations from a current supplier or service provider to the successful bidder, it may be required of the successful bidder to avail themselves before commencement of the agreement in order to facilitate ease of transition and secure continuity of pertinent services to CSIR, where applicable. This should and will be at no cost to the CSIR. This phase should not be interpreted as part of the contract.

## 13 POST TERMINATION DISENGAGEMENT AND TRANSITION

It is expected of the successful bidder to be fully involved in such activities, where applicable, that will enable a seamless handover of the obligations to a newly appointed supplier or service provider and allow for a smooth transition.

## 14 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.

## 15 ADDITIONAL TERMS AND CONDITIONS

15.1 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.

15.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

15.3 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 with clear indication of the lead partner, including split of work;
- Copy of a valid certificate or consolidated B-BBEE score card or sworn affidavit;
- The latest Tax Compliance Status (TCS) or CSD Report of each joint venture partner;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificate/s.

15.4 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.

15.5 No goods and/or services should be delivered to the CSIR without an official CSIR Purchase Order. The CSIR purchase order number must be quoted on the invoice. Invoices without CSIR purchase order numbers will be returned to supplier without payment.

15.6 Failure to comply with any of the terms and conditions as set out in this document will invalidate the proposal.

## 16 SPECIAL CONDITIONS

The CSIR reserves, in its sole discretion, the right to:

16.1 Extend the closing date of this RFP;

16.2 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;

16.3 Verify any information contained in the bidder's submission;

16.4 Request documentary proof regarding the bidder's submission;

16.5 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;

16.6 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), and based on which bidder is offering best value for money;

16.7 Request a Best and Final Offer ("BAFO")

16.8 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;

16.9 Award this RFP as a whole or in part;

16.10 Award this RFP to multiple bidders;

16.11 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;

16.12 Post-tender negotiate on any elements on the bid, including but not limited to technical, transformation, price, conditions precedent and contractual terms and conditions;

16.13 Request presentations from shortlisted bidders. All costs relating to the preparation of such presentations to be borne by the bidders.

16.14 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.

16.15 Procure goods or services from the market if the current market price for such goods or services becomes lower than the prices stipulated in the Contract. Should the CSIR determine that a lower market price is available, the CSIR shall notify the Supplier/Service Provider in writing of such finding. The Supplier/Service Provider shall have the right to respond within a defined period, and if a mutually acceptable price adjustment cannot be reached, the CSIR may, at its discretion, source the goods or services from another Supplier/Service Provider, or terminate this Contract in accordance with its terms.

## 17 DUE DILIGENCE AND RISK ASSESSMENT

17.1 The CSIR has a legal and moral obligation to ensure that a successful bidder's financial position does not place public money or services at unacceptable risks and may therefore perform due diligence and risk assessment of recommended bidder(s)' prior to award.

17.2 As part of due diligence and risk assessment, the bidder must ensure that the bidder is complying to all regulatory prescripts, including industry regulations specific to the commodity/services procured, that are applicable to this tender, as well as ethical business practices. The CSIR has the right to request evidence of this compliance from the bidder, and third parties, for purposes of the due diligence exercise and for audit or contracting arrangements.

17.3 The recommended bidder(s) will be required to consent in the agreement to continuous and in-depth due diligence to ensure ethical business practices throughout the term of the tender.

## 18 CONFLICT OF INTEREST, CORRUPTION AND FRAUD

18.1 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. The attention of bidders is drawn to section 4 (1) (b) (iii) of Competition Act No 89 of 1998.

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. The attention of bidders is drawn to the Prevention and Combatting of Corrupt Activities Act, No 12 of 2004.

f. has in the past engaged in any matter referred to above; or

g. has been found guilty in a court of law, administrative or regulatory authority having appropriate jurisdiction on charges of fraud and/or forgery or unethical or improper conduct, 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.

18.2 If at any time a bidder identifies a potential or actual conflict of interest, the bidder must immediately notify the CSIR in writing. The CSIR reserves the right to exclude the proposal/bid submitted by such bidder from further consideration, unless the bidder is able to resolve the conflict to CSIR's satisfaction. If it comes to CSIR's knowledge that there was indeed a conflict of interest or s potential conflict of interest, same will be grounds for disqualification of the bidder.

## 19 GUARANTEE

19.1 Where applicable, the successful bidder may be required to lodge a guarantee in the amount to be determined by the CSIR, in its sole discretion.

## 20 MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

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

20.2 It follows therefore that misrepresentations in a bid may give rise to termination and a claim by the CSIR against the bidder notwithstanding the conclusion of the Service Level Agreement or PO between the CSIR and the bidder for the provision of the Service or delivery of Goods 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.

## 21 SCREENING AND VETTING OF BIDDER

21.1 Acceptance of a bidder's proposal is subject to the condition that both the successful bidder and its personnel providing the goods and /or services, must be screened and cleared by the appropriate authorities to the level commensurate to the nature of the services or goods required by CSIR.

21.2 Obtaining the necessary clearance is the responsibility of the successful bidder concerned, however, CSIR reserves the right, at its own discretion, to require that screening and vetting be conducted of the successful bidder, its shareholders, directors, and other relevant office bearers. If the successful bidder appoints a subcontractor, the same provisions and measures will apply to the subcontractor.

21.3 The bidders shall supply and maintain a list of personnel involved in the project indicating their clearance status.

## 22 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.

## 23 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.

## 24 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.

## 25 TAX COMPLIANCE

No tender shall be awarded to a bidder who is not tax compliant. If a recommended bidder is not tax complaint, 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 whose verification against the Central Supplier Database (CSD) proves non-compliant. The CSIR further reserves the right to recover

incurred costs and/or 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.

## 26 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.

## 27 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.

## 28 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.

## 29 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 delivery or 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.

## 30 INTELLECTUAL PROPERTY

CSIR retains ownership of all intellectual property rights in the documents that form part of this RFP. These documents remain property of the CSIR for the purpose of the RFP and thereafter and must be used solely for RFP purposes.

Bidders will retain the intellectual property rights in their proposals but grant CSIR the right to reproduce any copyrighted works for the purposes of the tender process.

Subject to any specific provisions in any service level agreement, master services agreement, work orders or change orders or any other agreement concluded between CSIR and a bidder in terms of this RFP, all intellectual property rights created, generated, coded or designed in terms of this bid to meet CSIR's' business requirements and needs will be, and remain the perpetual exclusive property of CSIR. Successful bidders who so create, generate, code or design any intellectual property for CSIR in terms of this RFP, undertake to provide CSIR with full access to such intellectual property including the provision of security keys and access codes both during and after the bidders appointment as a service provider or vendor.

In the event that any bidder utilises any third party intellectual property, in terms of a license, to submit a bid, or that such third party intellectual property will be utilised to fulfil CSIR's

business requirements for the bid, bidders firstly warrant that they have the rights to do so, and also, agree to fully indemnify CSIR against in any claims whatsoever arising from the application of third party intellectual property in the CSIR environment.

## 31 PERSONAL INFORMATION

31.1 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.

31.2 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, statutory or other public bodies and potential purchasers of such Party or any part of their business).

31.3 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.

31.4 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 31 (Personal Information). The CSIR shall be entitled on reasonable notice to conduct an inspection or audit bidders compliance with the requisite POPI Act safeguards.

## 32 DISCLAIMER

This RFP is a request for proposals only and not an offer to do business with CSIR. 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

### 33 TERMS OF REFERENCE /TECHNICAL SPECIFICATION/SCOPE OF SERVICES

This RFP is for the provision of Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution. The service offering must include all requirements as set out in **Annexure B**.

### 34 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)** | **Presentation Proposed Demonstration Evaluation (Phase 3)** | **Price and Preference Points Evaluation (Phase 4)** | **Objective Criteria** |
|---|---|---|---|---|
| Only bidders that comply with ALL the criteria set on paragraph 34.1 on **Phase 1** 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 **Phase 2** below will proceed to Price and Preference Points Evaluation. (Phase 3) | Bidders will be evaluated out of 100 points and must obtain a minimum of an overall percentage of 50% and 50 % per criterion, as per Annexure C (2). Only bidder (s) who met and/or exceeded the minimum threshold points on Phase 3 below will proceed to Price and Preference Points Evaluation. (Phase 4). | Bidder(s) will be evaluated out of **100 points** i.e. **80 or 90 points** for Price and **20 or 10 points** 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). |

34.1 **Elimination Criteria (Phase 1)**

Proposals will be eliminated under the following conditions:

- Bidder that did not submit their bid through CSIR Electronic Bid Submission Portal will not be considered.
- Bidder that is listed on the NT database of restricted suppliers and 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).**

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

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

| No | ELEMENT | WEIGHT |
|---|---|---|
| 1 | POS functionality, including multi-outlet operations, sales processing, configurable payment types, integrated card terminals, debit and credit card transactions, contactless payments, mobile wallet / QR-code / voucher payments, corporate account and purchase-order billing, menu management, discounts, refunds, void controls, split billing and offline trading capability. | 15 |
| 2 | Inventory and centralized store management, including central store control, unit level inventory, stock issuing, transfers, stock-on-hand visibility, recipe-based deductions, purchase order generation and approval, mobile approval capability, barcode scanning, waste tracking, variance reporting and stock reconciliation. | 15 |
| 3 | System integration capability, including integration with finance, procurement, event booking system, online ordering, payment gateway, inventory, central store, invoice automation and other relevant CSIR systems. Bidders must provide a clear integration architecture, data flow, costs, timelines, responsibilities, dependencies and post-implementation support. | 15 |

| | | |
|---|---|---|
| 4 | Reporting and management information, including real-time dashboards, payment reconciliation reports, end-of-day reconciliation by payment type, transaction-level audit trails, VAT reporting, stock valuation, sales reports, inventory movement reports, variance and waste reports, scheduled exports and consolidated management reports. | 10 |
| 5 | Invoice automation capability, including OCR / AI data extraction, invoice capture, invoice verification, approval workflow, exception management, duplicate invoice detection, audit trails, integration with goods receipting and stock records, and export to finance, ERP, procurement, POS or inventory systems. | 10 |
| 6 | Implementation methodology, including project plan, configuration, data migration, integration testing, user acceptance testing, go-live support, transition approach, training and hypercare support. | 10 |
| 7 | Support, maintenance and service levels, including helpdesk support, incident logging, response and resolution times, escalation procedures, remote and onsite support, after-hours support, software updates, security patches, hardware support and service review arrangements. | 5 |
| 8 | Security, compliance and governance, including POPIA compliance, PCI DSS compliance where applicable, PCI PTS-approved payment terminals, EMV chip and contactless payment compliance, P2PE where proposed, mobile/tablet POS payment security, secure software lifecycle, vulnerability management, payment regulatory compliance, role-based access, audit trails, segregation of duties, backup, disaster recovery, data hosting, data ownership and CSIR ICT governance requirements. | 5 |
| 9 | Company profile, including years of operation, and relevant experience. | 5 |
| 10 | Contactable references for similar POS and inventory projects | 10 |
| **TOTAL (%)** | | **100** |

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**.**

34.3 **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.

## 35 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.
- Bidders must submit their latest three (3) audited annual financial statements and demonstrate a Current Ratio greater than 1 in each of those three (3) financial years

## 36 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;
- provide the CSIR of their CSD registration number.

## 37 CSIR ELECTRONIC BID SUBMISSION PORTAL

37.1 Bidders are required to be registered on the CSIR Electronic Bid Submission Portal to be able to submit bids through the portal. Registrations can be completed online at: www.tenders.csir.co.za.

37.2 All bids queries and responses would be through the CSIR Electronic Bid Submission Portal.

37.3 Where Consortia / Joint Ventures / Sub-contractors are involved, Principal/ Main party must be registered on the CSIR Electronic Bid Submission Portal.

37.4 Please see guide on how to register on the CSIR Electronic Bid Submission Portal: SUPPLIER REGISTRATION USER GUIDE. WATCH THE VIDEO DEMONSTRATION

# 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: | RFP No. 3788/27/11/2026 | CLOSING DATE: | 27 November 2026 | CLOSING TIME: | 16h30 |
| DESCRIPTION | **RFP for The Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years** | | | | |

| BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT *(STREET ADDRESS)* |
|---|
| The CSIR requires that all tender submissions be submitted electronically through CSIR Electronic Bid Submission Portal. Should tender file size exceed 20MB. |
| |

| BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO |
|---|
| CSIR Electronic Bid Submission Portal |

| 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? | ☐Yes ☐No<br>[IF YES ENCLOSE PROOF] | | **2** ARE YOU A FOREIGN BASED SUPPLIER FOR **THE GOODS /SERVICES /WORKS OFFERED?** | ☐Yes ☐No<br>[IF YES, ANSWER THE QUESTIONNAIRE BELOW] | |

| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS |
|---|
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO |

| | |
|---|---|
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | ☐ YES ☐ NO |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? | ☐ YES ☐ NO |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? | ☐ YES ☐ 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.

**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

# SCOPE OF SERVICES

## RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years

**RFP No. 3788/27/11/2026**

## 1. INVITATION FOR PROPOSAL

Proposals are hereby invited from suitably qualified service providers for the provision, implementation, integration, support and maintenance of an integrated Point of Sale (POS), inventory management, centralised store management and invoice automation solution for CSIR Conferencing and Accommodation (C&A) for a period of 5 years.

This RFP follows the Request for Information (RFI) process undertaken by CSIR C&A to test the market and obtain information on available POS, stock management, system integration and invoice automation solutions. The RFI responses have assisted CSIR in defining a broader and more informed scope of requirements for this RFP.

The purpose of the RFP is to obtain detailed technical, functional, commercial, pricing and implementation proposals, including a full cost breakdown and total cost of ownership, to allow CSIR to appoint a suitable bidder that can provide a reliable, fit-for-purpose solution. The system must strengthen operational efficiency, financial accountability, stock visibility, auditability, reporting and integration with relevant CSIR systems.

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 Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution

## 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, including years of operation, experience and local support capability.
b. Detailed technical proposal describing the proposed POS, inventory management, central store management and invoice automation solution.
c. Description of the proposed system architecture, including whether the solution is cloud-based, on-premises or hybrid.
d. Detailed response to all functional requirements, including POS functionality, inventory control, central store management, stock reconciliation, invoice automation, reporting and user access controls.
e. Inventory and central store functionality, including stock issuing, transfers, stock-on-hand visibility, recipe-based deductions, waste tracking, variance reporting, purchase order functionality and stock reconciliation.
f. Hardware compatibility response, including proposed hardware, minimum specifications, barcode scanning, tablet/mobile functionality, hardware restrictions, warranty and support arrangements.
g. Implementation methodology and project plan, including configuration, data migration, user acceptance testing, go-live and hyper care support

### 2.2. Financial Proposal:

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

- Pricing proposal (refer to Annexure D of the Schedule (**Annexure D**) .
- Valid B-BBEE Certificate or sworn affidavit.
- Latest CSD registration report (RSA suppliers only).

## 3. PROPOSAL SPECIFICATION

## 3.1. Scope of Work

The CSIR invites suitably qualified and experienced service providers to submit proposals for the supply, implementation, integration, support and maintenance of an integrated Point of Sale (POS), inventory management, centralized store management and invoice automation solution for CSIR Conferencing and Accommodation (C&A) for a period of 5 years

The solution is required to support CSIR C&A Food and Beverage operations across Newton's Eatery, the CSIR International Convention Centre (ICC) operational units and one centralized store. The system must improve operational efficiency, stock control, functional reliability, financial accountability, reporting, auditability and customer service.

The scope of work includes, but is not limited to, the following:

### 3.1.1 Overall Solution Requirement

The bidder must provide a complete and integrated solution, not a standalone till system. The proposed solution must function as an operational platform that links POS sales, inventory control, stock movement, purchase order functionality, invoice processing, payment reconciliation, reporting and management oversight.
The solution must support:

- POS trading across multiple outlets and service points;
- Centralized store management and outlet-level inventory visibility;
- Menu management and item or recipe-based stock deduction linked to POS sales;
- Stock movement, waste, variance and reconciliation reporting;
- Purchase order generation and approval workflow capability;
- Invoice scanning or integration with OCR/AI invoice automation tools;
- Real-time reporting dashboards and exportable reports;
- Integration with relevant CSIR systems, including finance, procurement, event booking, online ordering and payment systems where required;
- Functional reliability, offline trading capability and defined support service levels.

## 3.2 Point of Sale (POS) Functional Requirements

### 3.2.1 Sales Processing

The POS solution must support the full range of CSIR C&A food and beverage trading requirements, including normal restaurant sales, conference catering (DCP), event-related sales, take-away services, and where applicable accommodation-related billing.

- Dine-in, take-away, conference catering and event sales.
- Card, voucher, mobile, and corporate account payments.
- Split billing, multiple payment methods, discounts, and promotions.
- Service charges and gratuity processing where required.
- Void reporting with reason for capture and approval controls.

### 3.2.2 Menu and Product Management

- Centralized menu creation and administration.
- Outlet-specific menus, pricing and availability settings.
- Product categories, modifiers, add-ons, combos, and packages.
- Time-based pricing or event-specific pricing where required.
- Menu updates with audit trails and approval controls.

### 3.2.3 Mobility and Ordering Channels

Based on RFI feedback, bidders should be able to support modern ordering options. CSIR may implement these in phases depending on business needs and cost.

- Mobile POS devices or tablets for waitron ordering.
- Kitchen printers or kitchen display systems.
- Online ordering or pre-ordering capability.

## 4. Inventory and Centralized Store Requirements

The system must support both centralized and decentralized inventory management. This is a critical requirement because the CSIR C&A operating model includes a central store issuing stock to multiple F&B units.

### 4.1 Central Store Management

- Goods receipting from suppliers against purchase orders or delivery notes.
- Stock storage, batch tracking where applicable, stock counts and stock adjustments.
- Stock issuing from the central store to individual F&B units.
- Returns from units to the central store.
- Central store stock-on-hand visibility, valuation and movement reporting.
- Audit trails for receipts, issues, returns, adjustments, and stock counts.

### 4.2 Unit-Level Inventory Management

- Outlet-level stock-on-hand visibility.
- Stock transfers between central store and F&B units.
- Inter-unit transfers, subject to approval and traceability controls.
- Automatic stock deduction based on POS sales.
- Stock variance reporting per unit.
- Low-stock and out-of-stock alerts.

### 4.3 Purchase Order Generation Approval

The system must support, or be capable of supporting, purchase order functionality linked to the POS and inventory management system. Bidders must indicate whether purchase order functionality is native to the proposed system, available through an additional module, or available through integration with a procurement, finance or ERP system.

- Purchase order generation based on stock requirements, reorder levels, minimum stock levels, approved supplier lists, or manual purchase requests.
- Supplier selection and supplier database functionality.
- Purchase order approval workflows aligned to user roles, delegation of authority and segregation of duties.
- Ability for authorized users to review and approve purchase orders through a mobile device application, tablet or web-based mobile interface.

- Audit trails for purchase order creation, review, approval, amendment, cancellation and closure.
- Linkage between purchase orders, goods received notes, supplier invoices and stock receipting.
- Reporting on open, approved, cancelled, partially received and completed purchase orders.
- Integration with invoice automation, finance, procurement and inventory modules where applicable.

Bidders must clearly explain how the purchase order generation and approval process works, including any system limitations, dependencies, licensing requirements, configuration requirements, integration requirements, and cost implications.

### 4.4 Recipe, Costing and Consumption Control

The system must support recipe, costing and consumption control, including:

- Recipe setup with ingredients, quantities, and yields.
- Item-based or recipe-based stock deduction linked to sales.
- Menu item costing and margin support where available.
- Consumption reporting by product, category, outlet and event.
- Variance reporting between theoretical usage and actual stock count results.

### 4.5 Waste, Shrinkage and Expiry Control

The system must support waste, shrinkage and expiry monitoring, including:

- Waste capture per unit with reason codes.
- Spoilage, damaged stock, and expired stock tracking.
- Shrinkage reporting and variance investigation support.
- Expiry date or batch monitoring where applicable.
- Management reports for waste trends, stock losses, and corrective action.

### 4.6 Stock Reconciliation

The system must support accurate reconciliation between central store receipts, stock issues, outlet sales, waste, returns, and stock counts. This is essential for internal control, audit readiness, and financial reporting.

The system must provide:

- Reconciliation between stock received, issued, sold, wasted, and counted.
- Stock movement reports by item, unit, user and date range.
- Stock valuation reports for Finance and Management Review.
- Exception reports for negative stock, unusual adjustments, and high variance items.

**5. Invoice Automation Requirements**

The solution must include invoice automation functionality or demonstrate seamless integration with an approved invoice automation platform. Invoice scanning software uses OCR and AI to digitize, extract and record data from invoices, reduce manual entry, improve accuracy, and save administrative time.

**5.1 Required Invoice Automation Process**

- Capture: Invoices must be uploaded via email, scanning, mobile capture, or direct upload.
- Extraction: The software must use OCR and AI to extract relevant invoice data automatically.
- Verification: Users must be able to review, validate and correct extracted data, with the AI improving corrections where supported.
- Export: Verified invoice data must be exported to accounting, ERP, procurement, POS, or inventory systems.

**5.2 Invoice Data Extraction**

- Supplier name and supplier code applicable.
- Invoice number and invoice date.
- Purchase order references where applicable.
- Line-item descriptions, quantities, prices, and totals.

- VAT and tax values.
- Delivery notes references where applicable.
- Duplicate invoice detection and exception reporting.

### 5.3 Workflow and Controls

- User verification and approval workflow.
- Exception management for unreadable or unmatched invoices.
- Audit trail of invoice capture, correction, approval and export.
- Integration with goods receipting and stock records where applicable.
- Ability to support CSIR segregation of duties and approval controls.

## 6. Reporting and Business Intelligence

The solution must provide real-time operational, stock, and financial reporting. Reports must be available at outlet level and consolidated across all C&A F&B units and the central store.

- Daily sales reports by outlet, product, category, user and payment type.
- Payment reconciliation reports.
- Revenue reporting by outlet, event or service type.
- Inventory movement, valuation, variance, and waste reports.
- Dashboards for operational supervisors, management, Finance and Procurement.
- Scheduled reports by email or export to Excel/PDF where available.

## 7. System Integration Requirements

The proposed solution must demonstrate the capability to integrate with relevant CSIR applications, systems, and third-party platforms where required.

For purposes of this RFP, bidders are not required to demonstrate completed integration with specific named CSIR systems at tender stage. CSIR systems, platforms and technologies may change during the contract period, and the evaluation will therefore focus on the proposed solution integration capability, flexibility and openness, rather than existing integration with a specific system.

The proposed solution must:

- Provide an open, documented and supported API or equivalent standards-based integration capability;
- Support secure data exchange with external systems and third-party applications;
- Support commonly used integration methods, including RESTful APIs where applicable;
- Allow configurable data mapping and data transformation;
- Support integration with systems or platforms used for finance, procurement, purchase orders, invoice management, identity management, event management, online ordering, payment processing and reporting where required;
- Support integration with established third-party online-ordering or related platforms where appropriate;
- Clearly identify any limitations, dependencies, licensing requirements or third-party components affecting integration;
- Demonstrate that integrations can be developed or adapted should CSIR systems change during the contract period; and
- Provide suitable technical documentation and support for future integration activities.

**7.1 Bidder Response Requirements**

The bidder must provide information on:

- The available API and integration architecture;
- Whether the API is open and documented;
- Available connectors, middleware or integration tools;
- Authentication and security mechanisms used for API access;
- Data mapping and transformation capability;
- Delevant previous integration experience;
- Examples of systems or platforms previously integrated with the proposed solution;
- The bidder's approach to working with third-party system developers or CSIR technical resources;
- Any integration limitations or dependencies; and
- The indicative pricing model applicable to future integration work.

**7.2 Integration Implementation**

Actual integration with CSIR systems is not necessarily included as a mandatory implementation requirement under the initial scope of this RFP.

Where integration is subsequently required, the scope, technical requirements, responsibilities, timelines and cost will be agreed with the CSIR before implementation.
Integration work may be performed by:

- The appointed POS solution provider;
- The provider of the relevant CSIR system;
- CSIR technical resources; or
- Another appropriately appointed technical service provider.

The successful bidder must cooperate with the relevant technical parties and provide reasonable technical information, API documentation and support required to facilitate such integration.
Any integration specifically included in the bidder's base solution or pricing must be clearly identified. Any integration functionality or development that is optional or subject to additional cost must also be separately disclosed.

### 7.3 Evaluation Approach

Integration will be evaluated primarily on the bidder's demonstrated:

- Open API capability;
- Integration flexibility;
- Technical approach;
- Relevant integration experience;
- Documentation and support capability; and
- Ability to accommodate future system changes.

Bidders will not be disadvantaged solely because the proposed solution does not currently integrate with a particular named CSIR application, provided that adequate integration capability is demonstrated.

## 8. Payment Processing Requirements

### 8.1. Payment Acceptance and Processing

The proposed solution must support a range of payment acceptance methods appropriate for the CSIR's hospitality and conferencing environment. Bidders must clearly describe all payment types supported, processing flows, and reconciliation mechanisms.

- Integrated card terminals with chip, contactless (NFC) and magnetic stripe acceptance.
- Mobile wallet and QR code payment acceptance (e.g. Snap Scan, Zapper, Apple Pay).
- End-of-day reconciliation by payment type.
- Transaction-level audit trails are reconcilable to payment-terminal and settlement records.
- Identification of all third-party payment providers, acquiring banks, and payment services.

### 8.2 PCI DSS (Payment Card Industry Data Security Standard) Compliance – Mandatory where applicable

Where the proposed solution stores, processes, transmits or can affect the security of cardholder data, the bidder shall comply with the applicable PCI DSS requirements (currently PCI DSS v4.0, including Phase 2 requirements effective May 2025).

The bidder shall provide applicable evidence, including:

- Current Attestation of Compliance (AOC).
- Applicable SAQ or ROC (Self-Assessment Questionnaire, or Report on Compliance**)**
- PCI DSS scope statement and QSA (Qualified Security Assessor) details where applicable.
- Remediation status for any outstanding findings.
- **Evidence relating to relevant subcontractors and hosted services.**

### 8.3 Payment Terminals and PIN Security

All payment terminals supplied as part of the solution shall be current and appropriately approved for PCI PTS (Payment Card Industry PIN Transaction Security) devices. The bidder shall provide manufacturer, exact model, hardware/firmware version, PCI PTS approval/listing reference, approval status and expiry date. Where PIN processing is provided, the bidder shall demonstrate compliance with applicable PCI PIN Security requirements

### 8.4 P2PE (Point-to-Point Encryption)-Preferred

PCI-listed Point-to-Point Encryption (P2PE) is strongly preferred where the POS solution interfaces with payment terminals. Where P2PE is proposed, the bidder shall provide: P2PE solution name and listing, solution provider, POI (Point of Interaction) component list, key-management responsibilities, P2PE Instruction Manual, and description of the validated P2PE solution boundaries.

**8.5 Payment Software Security- Mandatory where applicable**

Where the proposed payment/POS(Point-of-sale) software falls within PCI Secure Software requirements, the bidder shall demonstrate compliance with PCI **(Payment Card Industry)** Secure Software and Secure Software Lifecycle requirements. Evidence shall include PCI listing/reference, product name and version, validation status, Report on Validation, secure software development lifecycle, and vulnerability management processes.

**8.6 Mobile and Tablet POS-Mandatory where applicable**

Where mobile phones, tablets or other COTS (commercial-off-the-shelf) devices are used for payment acceptance, the bidder shall demonstrate compliance with the applicable PCI requirements, including MPoC (Mobile Payments on Commercial Off-the-Shelf), CPoC (Contactless Payments on COTS) and/or SPoC (Single Point of Contact), as applicable to the proposed architecture.
The bidder shall provide the relevant PCI listing, platform/version details, validation status, attestation, and security-monitoring arrangements.

**8.7 EMV (Europay, Visa, and Mastercard,) Compliance-Mandatory**

- The proposed solution shall support EMV chip and contactless payment acceptance. The bidder shall provide evidence of applicable: EMV Level 1 approval (hardware/terminal), EMV Level 2 approval (application kernel), EMV Level 3 certification (acquirer/card-scheme), supported payment kernels, current Letters of Approval, and acquirer/card-scheme certification details.

The bidder shall clearly identify which certifications apply to the proposed solution and which are the responsibility of the acquiring bank or payment service provider.

**8.8 Payment Services and Regulatory Compliance-Mandatory where applicable**

- Where the bidder or any component of the proposed solution performs payment switching, aggregation, settlement, e-money or other regulated payment functions, the bidder shall demonstrate compliance with applicable South African regulatory and payment-system requirements. Evidence shall include applicable SARB (South African Reserve Bank)/PASA (Payment Association of South Africa) recognition or authorization, acquiring bank sponsorship arrangements, relevant card-scheme registrations, settlement-flow diagram and payment processing architecture.

**8.9 Payment Processing Architecture-Mandatory**

The bidder shall provide a high-level payment processing architecture illustrating the flow of a payment transaction from the POS device through the payment terminal, payment gateway/acquirer and settlement process, identifying: POS application, payment terminal, payment gateway/switch, acquiring bank, card schemes, payment service provider, settlement process, systems storing transaction records, systems storing cardholder data, and security/encryption boundaries

**9. Security, Governance and Audit Requirements**

**Information Security Requirements**

**9.1. Identity and Access Management**

The proposed solution must provide secure and practical user access controls such as:

- Individual user authentication with sign-in options such as username and password, staff card, biometric authentication or other secure authentication method supported by the proposed solution
- User authentication with support for integration with Microsoft Entra ID for SSO
- Multifactor authentication (MFA)
- Role-based access based on defined user roles and least-privilege principles.
- Privileged access management, including appropriate controls over administrative and elevated accounts.

## 9.2. Data Security

- Encryption in transit
- Encryption at rest

### 9.2.1. Minimum Encryption Standards:

The proposed solution shall support the following minimum encryption standards:

(a) Data at rest: AES-256 encryption or equivalent approved algorithm for all personal information, cardholder data, financial records and system credentials.

(b) Data in transit: TLS 1.2 or higher for all data transmitted between system components, external systems and end-user devices.

(c) The bidder shall maintain a documented cryptographic key management programme.

Evidence Required at Bid Stage: Encryption architecture diagram identifying all encryption points; specification of algorithms and key lengths used for each data category; confirmation of key management capability; confirmation of compliance with PCI DSS Requirements 3 and 4.

### 9.2.2. Data Residency and Sovereignty:

**(a) Primary Data Residency:** All personal information as defined in POPIA, cardholder data as defined in PCI DSS, and CSIR operational data (including sales records, inventory data, financial transactions and audit logs) shall be stored and processed within the borders of the Republic of South Africa.

**(b) Transborder Data Flows:** Where any component of the solution requires data to be transmitted, processed or stored outside South Africa, the Service Provider shall: (i) obtain prior written approval from the CSIR; (ii) demonstrate that the recipient country provides adequate protection per POPIA Section 72; (iii) implement binding contractual clauses providing equivalent protection; and (iv) ensure cardholder data remains within PCI DSS-compliant jurisdictions aligned with SARB domestic acquiring directives.

**(c) Cloud Hosting:** Where the solution is cloud-hosted, the Service Provider shall: confirm the primary data Centre is located within South Africa; identify the cloud service provider and data Centre location(s); provide evidence that the cloud provider holds ISO 27017 (Cloud Security) and ISO 27018 (Cloud Privacy) certifications; confirm no data replication occurs outside South Africa without prior CSIR approval.

**(d) Evidence Required:** Data residency statement; cloud provider certifications (ISO 27017, ISO 27018); data flow diagram showing all cross-border movements; contractual mechanisms for transborder data protection.

### 9.3. Incident and Vulnerability Management

- Incident response strategy/process, including incident identification, escalation, containment, notification, investigation, and remediation.
- Defined processes and timelines for notifying CSIR of information security incidents affecting the solution or CSIR information.
- Vulnerability management strategy

The bidder shall demonstrate readiness to comply with POPIA 2025 Amendment Regulations requiring mandatory e-Portal breach reporting.

Evidence Required at Bid Stage: Breach notification procedure (summary); confirmation of e-Portal reporting readiness; incident response team structure.

### 9.4. Application Security

- Evidence of secure development
- Patching strategy
- The solution must be subject to independent penetration testing

9.4.1. Independent Security Testing

The Service Provider shall:

(a) Commission an independent penetration test of the full solution prior to production deployment, covering external/internal network, web application (OWASP Top 10), and API security testing.

(b) Conduct independent penetration testing at least annually thereafter.

(c) All testing shall be conducted by a qualified, independent third-party assessor in accordance with recognized methodologies (PTES, OWASP, NIST SP 800-115, or PCI DSS guidance).

Evidence Required at Bid Stage: Most recent penetration test executive summary; name and qualifications of the testing firm; confirmation of annual testing commitment; sample remediation tracking approach.

### 9.5. Auditability and logging

The solution must maintain appropriate, traceable audit logs covering:

- sales and financial transactions;
- stock movements and adjustments;
- approvals, refunds, voids and overrides;
- changes to relevant records and reports;
- administrative and privileged-user activities; and
- system and security-relevant configuration changes.

Audit logs must be protected against unauthorised modification or deletion.

### 9.6. Backup Resilience and Disaster Recovery

- Backup strategy and recovery strategy must be aligned with CSIR ICT standards

The system must align with CSIR governance, information security, and audit requirements. The bidder must clearly describe hosting, data ownership, backups, user controls, and compliance measures.

- Data encryption, backup, and disaster recovery measures.
- POPIA compliance and data protection controls.
- Clear data hosting model, including whether data is hosted on-premises, in the cloud or in a vendor-controlled environment.
- Ability to support CSIR change control and ICT governance processes.

### 9.7. Certifications – Information Security Management System

The bidder shall comply a valid ISO/IEC 27001:2022 certification, issued by a certification body accredited by a member of the International Accreditation Forum (IAF).

### 9.8. Governance Summary

The system must align with CSIR governance, information security and audit requirements. The bidder must clearly describe hosting, data ownership, backups, user controls, compliance measures, POPIA compliance, data protection controls, and ability to support CSIR change control and ICT governance processes.

**10. Functional Reliability and Performance**

Functional reliability is a core requirement because C&A operates in a live hospitality environment where downtime directly affects service delivery, customer experience and revenue control.

- Minimum proposed uptime and availability commitments.
- Offline trading capability during internet or network interruptions.
- Automatic synchronization once connectivity is restored.
- Performance stability during peak service periods and high-volume events.
- Failover, backup, and disaster recovery approach.
- Remote diagnostics and incident escalation procedures.
- Defined support response and resolution times.

**11. Hardware Requirements**

The bidder must propose all hardware required for the effective operation of the proposed solution and must clearly indicate whether the hardware may be purchased outright, rented, leased, or provided through a subscription model. Pricing must clearly separate hardware, software, implementation, integration, training, support and maintenance costs.
The bidder must provide detailed hardware specifications and confirm whether the proposed software is compatible with standard commercially available hardware or requires proprietary /vendor-specific hardware. Any hardware restrictions, minimum technical specifications, dependencies, or limitations must be clearly stated, including any cost implications for CSIR.
The proposed hardware solution must include, where applicable:

- POS terminals and back-office workstations required for front-of-house, back-office and management functions.

- Tablets or mobile POS devices for order taking, mobile transactions, stock receiving, stock issuing, stock transfers, stock adjustments and stock takes.
- Kitchen display systems and/or kitchen printers for food preparation and order routing;
- Receipt printers, cash drawers and barcode scanners.
- Barcode scanning capability for goods receiving stock take, stock issuing, stock transfers and inventory control.
- Payment terminals or approved payment integration devices.
- Hardware required for the central store and the three Food and Beverage units.
- Network, connectivity, peripheral or supporting hardware required for full system functionality.
- Hardware warranties, replacement process, repair turnaround times and support arrangements.
- Minimum technical specifications and compatibility requirements for all proposed hardware.

The bidder must also confirm whether the proposed solution is compatible with CSIR's existing hardware environment (Vector POS), where applicable. The bidder must clearly identify:

- Existing hardware that can be reused.
- Existing hardware that is not compatible.
- Hardware that must be replaced.
- Additional hardware required for full implementation.
- Any risks associated with using existing hardware.
- Any additional licensing, configuration, support or warranty implications.

The solution must support digital stock capture through tablets, mobile devices and/or barcode scanners to reduce paper-based processes and avoid duplicate manual capturing of stock transactions into the system.

Generic confirmation of hardware compatibility will not be sufficient. Bidders must provide a detailed hardware compatibility response, including technical specifications, proposed hardware models, warranty terms, support arrangements and pricing.

**12. Implementation Services**

The appointed service provider must provide a structured implementation methodology that minimizes disruption to daily operations. Bidders must include a project plan and resource model.

- Project initiation and detailed requirements confirmation.
- Process mapping for POS, store, stock, finance, and reporting workflows.
- System configuration, menu setup, product setup, and user roles.
- Data migration for products, suppliers, recipes and opening stock where applicable.
- Integration of design, development, testing, and sign-off.
- User acceptance testing and issue resolution.
- Go-live planning, onsite support, and post-go-live hyper care.
- Implementation timeline with milestones and dependencies.

**13. Training and Change Management**

- Training must be practical, role-based, and aligned to CSIR C&A operations.
- Training for waitrons and supervisors.
- Training for central store and inventory users.
- Training for Finance and Management Users.
- System administrator training.
- Training manuals, quick reference guides, and standard operating guidance.
- Refresher training or additional training options.

**14. Support, Maintenance and SLA Requirements**

- Helpdesk or service desk support with incident logging.
- Remote support and diagnostics.
- Onsite support where required.
- After-hours and emergency support options.
- Software updates, patches, and upgrades.
- Hardware maintenance and replacement support.
- Escalation matrix and account management arrangements.
- Monthly or quarterly service review meetings where required.

## 15. Commercial and Pricing Requirements

Bidders must provide a transparent pricing model that enables CSIR to evaluate total cost of ownership over the contract term.

- Software license or subscription costs.
- Module costs per POS terminal, back-office user, tablet, kitchen display or other device.
- Hardware purchase, rental or lease pricing.
- Implementation and training fees.
- Integration costs, including API development and third-party connector costs.
- Support and maintenance fees.
- Invoice automation module or third-party software costs.
- Any once-off, recurring, optional or variable costs.
- Pricing assumptions, exclusions, and escalation rates.

## 16. Minimum Deliverables

The table below provides a summary of the minimum deliverables required under this RFP. It must be read together with the detailed scope of services, technical requirements, pricing schedule and evaluation criteria contained in this RFP

| No | Deliverables | Description |
|---|---|---|
| 1. | Solution design and configuration document | Confirmed configuration, modules, workflows, roles, menus, stock locations and reporting structure. |
| 2. | Implementation project plan | Detailed timeline with milestones, responsibilities, risks and dependencies. |
| 3. | Configured POS and inventory system | Functional POS, inventory, central store and reporting environment. |
| 4. | Invoice automation capability | Native or integrated OCR/AI invoice processing workflow. |
| 5. | Integrated payment processing | Configured and tested payment options and reconciliation reporting. |

| | | |
|---|---|---|
| 6. | Integration setup | Agreed integrations with finance, procurement, event or other systems. |
| 7. | Training material and training sessions | Role-based training and user documentation. |
| 8. | Testing and acceptance sign-off | User acceptance testing, issue log and final sign-off. |
| 9. | Go-live and hypercare support | Live deployment support and post-go-live stabilisation. |
| 10. | Support and maintenance plan | SLA, escalation matrix and maintenance arrangements. |

**17. Conclusion**

The proposed RFP scope reflects the requirements identified through the RFI process and the operational needs of CSIR C&A. The scope is intentionally broader than a basic POS requirement because CSIR requires an integrated solution that can strengthen stock control, support a centralized store model, improve reliability, automate invoice processing, enable reporting and support financial accountability.

Bidders should be required to demonstrate the solution, provide detailed pricing, confirm integration capability, submit implementation timelines and clearly identify any functionality that is third-party, optional, customised or not supported. This will allow CSIR to assess the most suitable solution based on operational fit, risk, governance, cost and long-term value.

**Annexure C**

**Technical Evaluation Matrix/Rubrics**

**RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years**

**RFP No. 3788/27/11/2026.**

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

| Competence Criterion | Key Aspects of Criterion | Scoring Guideline | Score | Weighting |
|---|---|---|---|---|
| POS Functionality | The proposed solution must support multi-outlet POS operations, sales processing, payment options, menu management, discounts, refunds, void controls, and offline trading capability. | Fully supports multi-outlet POS operations, including dine-in, takeaway, conference/event sales, integrated card terminals, debit/credit card payments, contactless payments, mobile wallet, QR-code and voucher payments, corporate account and PO billing, configurable tender types, split billing, discounts, refunds, void reason capture, menu management and offline trading, with clear evidence provided. | 10 | 15 |
| | | Supports most POS requirements, including multi-outlet trading, payment options, menu management and offline trading, but some payment functionality or advanced controls require configuration, additional modules or clarification. | 7 | |
| | Required Portfolio of Evidence: System brochure or technical datasheet; screenshots of the POS interface; menu setup examples; evidence of multi-outlet functionality; evidence of offline trading capability; workflows for sales, refunds, discounts, voids and split billing; demo script or access to a demonstration environment. | Supports basic POS functionality, but has limited evidence of multi-outlet control, offline trading, event billing, advanced payment types or approval controls. | 4 | |
| | | Does not adequately support the POS requirements, or no supporting evidence is provided. | 0 | |
| Inventory and Centralized Store Management | The proposed solution must support central store management, unit-level inventory, stock issuing, transfers, stock-on-hand visibility, recipe-based deductions, purchase order functionality, waste tracking, variance reporting, and stock reconciliation. | Fully supports central store and outlet-level inventory management, including goods receipting, stock issuing, transfers, stock counts, stock adjustments, recipe-based deductions, purchase order generation, waste/shrinkage/expiry tracking, barcode scanning, mobile stock capture and stock reconciliation, with strong evidence. | 10 | 15 |

| Competence Criterion | Key Aspects of Criterion | Scoring Guideline | Score | Weighting |
|---|---|---|---|---|
| | | Supports most inventory and central store requirements, but some functions such as mobile stock capture, expiry tracking, PO approval or advanced reconciliation require additional modules, integration or configuration. | 7 | |
| | Required Portfolio of Evidence: Inventory module specification; screenshots showing central store, outlet stock, transfers and stock-on-hand; sample stock movement reports; recipe or item-based stock deduction example; evidence of waste, shrinkage, variance and expiry tracking; barcode scanning functionality; tablet/mobile stock capture evidence; PO generation and approval workflow diagram, approval and status tracking; evidence of mobile PO approval; sample PO report; explanation of how POs link to goods receiving, invoice automation and stock receipting. | Supports basic stock management, but limited evidence of central store control, recipe deductions, PO functionality, waste tracking, or detailed reconciliation. | 4 | |
| | | Does not adequately support inventory and centralized store requirements, or no supporting evidence is provided. | 0 | |
| System Integration Capability | The bidder must demonstrate the ability to integrate with CSIR finance, procurement, event booking, online ordering, payment, inventory, and invoice automation systems. The proposal must include an integration approach, costs, timelines, responsibilities, and dependencies. | Provides a detailed and practical integration proposal covering required systems, APIs/connectors, data flow, payment processing architecture, integration costs, timelines, responsibilities, dependencies, testing approach, security requirements and post-implementation support. | 10 | 15 |
| | | Provides an acceptable integration approach, but some details such as costs, timelines, data flow, payment architecture, dependencies, or responsibilities require clarification. | 7 | |
| | Required Portfolio of Evidence: Integration architecture diagram; API documentation or connector list; written integration approach; list of systems previously integrated; data flow explanation; integration cost breakdown; implementation timelines and dependencies; evidence of integration with finance, procurement, event booking, online ordering, payment gateways, inventory or invoice automation tools. | Provides limited integration detail and mainly confirms API availability without sufficient practical explanation. | 4 | |
| | | Does not demonstrate integration capability, or no supporting evidence is provided. | 0 | |
| Reporting and Management Information | The proposed solution must provide real-time dashboards, payment reports, VAT reporting, stock valuation, sales reports, stock movement reports, variance reports, and consolidated management reports. | Fully supports real-time operational, stock and financial reporting, including dashboards, sales reports, payment reconciliation, end-of-day reconciliation by payment type, transaction-level audit trails linking POS to payment/settlement records, VAT reports, stock valuation, stock movement, waste, variance and exception reporting, with sample reports or screenshots. | 10 | 10 |

| Competence Criterion | Key Aspects of Criterion | Scoring Guideline | Score | Weighting |
|---|---|---|---|---|
| | | Supports most required reports, but some dashboards, exception reports or consolidated reports require configuration or further clarification. | 7 | |
| | Required Portfolio of Evidence: Sample reports and dashboards; screenshots of real-time sales reporting, cash-up, VAT, payment reconciliation, stock valuation, stock movement, variance and management reports; supported export formats such as Excel, CSV or PDF. | Supports basic reporting only, with limited evidence of consolidated dashboards, stock valuation, payment reconciliation, transaction-level audit trails, variance or exception reporting. | 4 | |
| | | Does not adequately support reporting requirements, or no supporting evidence is provided. | 0 | |
| Invoice Automation Capability | The proposed solution must include native or integrated invoice automation using OCR and/or AI for invoice capture, extraction, verification, approval workflow, and export to finance or ERP systems. | Fully supports invoice automation, including email/upload/scanning capture, OCR/AI extraction, user verification, approval workflow, duplicate detection, exception management and export to finance/procurement/inventory systems. | 10 | 10 |
| | | Supports invoice automation through an integrated third-party solution, with acceptable detail on workflow, costs, integration, and support. | 7 | |
| | Required Portfolio of Evidence: OCR/AI invoice automation brochure or specification; screenshots of invoice upload, data extraction, verification and approval workflow; sample extracted invoice fields; evidence of duplicate invoice detection; explanation of export to finance, ERP, procurement, POS or inventory systems. | Limited invoice automation capability or only partial OCR/extraction functionality is available, with further development or integration required. | 4 | |
| | | Does not support invoice automation, or no supporting evidence is provided. | 0 | |
| Implementation Methodology | The bidder must provide a practical implementation methodology and project plan, including configuration, data migration, testing, user acceptance testing, go-live support, and hypercare. | Provides a detailed implementation plan with clear phases, timelines, milestones, responsibilities, risks, dependencies, data migration approach, testing, UAT, go-live and hypercare support aligned to CSIR operations. | 10 | 10 |
| | | Provides a clear implementation approach with summarized milestones and timelines, but some details require clarification. | 7 | |
| | Required Portfolio of Evidence: Detailed project plan; implementation methodology; timeline with milestones; resource plan; risk and dependency register; data migration plan; testing plan; user acceptance testing approach; go-live and hyper-care plan; training plan; role-based training schedule; training material samples; user manuals and quick reference guides. | Provides a basic implementation summary with limited detail on timelines, responsibilities, risks, testing, or dependencies. | 4 | |
| | | Does not provide an acceptable implementation methodology or project plan. | 0 | |

| Competence Criterion | Key Aspects of Criterion | Scoring Guideline | Score | Weighting |
|---|---|---|---|---|
| Support, Maintenance and Service Levels | The bidder must provide a support and maintenance model, including a project manager, helpdesk support, response times, escalation procedures, software updates, hardware support, and SLA commitments. | Provides a comprehensive support model including project manager, helpdesk, incident logging, remote and onsite support, after-hours support, escalation matrix, response and resolution times, software updates, hardware support and service review arrangements. | 10 | 5 |
| | | Provides an acceptable support model, but some SLA details, response times, or escalation arrangements require clarification. | 7 | |
| | Required Portfolio of Evidence: Draft SLA; helpdesk process; escalation matrix; response and resolution times; support hours; onsite and remote support model; software update process; hardware support process; account management arrangements; warranty and replacement process for hardware. | Provides limited support information with insufficient detail on SLA, response times, or maintenance responsibilities. | 4 | |
| | | Does not provide acceptable support and maintenance proposals. | 0 | |
| Security, Compliance and Governance | The proposed solution must support POPIA compliance, role-based access, audit trails, segregation of duties, backup, disaster recovery and CSIR governance requirements. | Fully addresses security and governance requirements, including POPIA, PCI DSS scope/evidence where applicable, PCI PTS-approved terminals, EMV chip/contactless compliance, P2PE where proposed, MPoC/CPoC/SPoC where mobile/tablet payment acceptance applies, secure software lifecycle, vulnerability management, payment regulatory compliance, data hosting model, encryption, backups, disaster recovery, audit trails, segregation of duties and CSIR ICT governance alignment. | 10 | 5 |
| | | Addresses most security and governance requirements, but some items such as PCI evidence, data hosting, payment security architecture, backup or disaster recovery require clarification. | 7 | |
| | Required Portfolio of Evidence: POPIA compliance statement; data hosting model; backup and disaster recovery plan; access control matrix; segregation of duties controls; audit trail examples; cybersecurity/security policy summary; data ownership and retention statement; confirmation of compliance with CSIR ICT governance requirements. | Provides limited security and compliance information with insufficient detail on PCI, audit trails, segregation of duties, data protection or payment security. | 4 | |
| | | Does not adequately address security, compliance and governance requirements. | 0 | |
| Company Experience | The bidder must demonstrate relevant organizational experience, years of operation, ownership structure, local support capability and experience in similar POS, inventory management, or multi-outlet Food and Beverage environments. | The bidder has 10 or more years' relevant experience, provides a complete company profile, clear ownership structure, strong local support capability and evidence of similar POS, inventory or hospitality technology projects. | 10 | 5 |

| Competence Criterion | Key Aspects of Criterion | Scoring Guideline | Score | Weighting |
|---|---|---|---|---|
| | | The bidder has 5 to less than 10 years' relevant experience, provides a company profile, ownership structure, local support capability, and acceptable evidence of similar projects. | 7 | |
| | Required Portfolio of Evidence: Company profile; proof of years in operation; details of local support presence; list of similar POS, inventory, hospitality, or multi-outlet F&B projects completed; | The bidder has 3 to less than 5 years' relevant experience, provides limited company information, and limited evidence of similar project experience. | 4 | |
| | | The bidder has less than 3 years' relevant experience, does not provide sufficient company information, or does not demonstrate relevant experience. | 0 | |
| References | The bidder must provide contactable references for similar POS, inventory management, hospitality, conferencing, restaurant, catering or multi-outlet Food and Beverage technology projects. | The bidder provides three or more contactable references, reference letters, completion letters, or case studies for similar projects. | 10 | 10 |
| | | The bidder provides two contactable references for similar projects. | 7 | |
| | Required Portfolio of Evidence:<br>List of contactable references for similar projects. At least minimum of three contactable references for similar projects, including client name, contact person, contact details, project description, implementation period and services provided; reference letters where available. | The bidder provides one contactable reference for a similar project. | 4 | |
| | | The bidder provides no contactable references, or references are not relevant to the required scope. | 0 | |
| **Total** | | | | **100%** |

## Phase Two (2) Presentation Evaluation Matrix/Rubrics

### Test Case

Bidders who meet the minimum technical threshold will be requested to conduct a live demonstration of their proposed Point of Sale (POS), inventory management, centralized store management and invoice automation solution.
The demonstration must show how the proposed solution will support CSIR Conferencing and Accommodation (C&A) Food and Beverage operations across Newton's Eatery, ICC operational units and one centralised store.

### Demonstration Scenario

The bidder must demonstrate the following operational scenario:

**Scenario 1: End-to-end Central Store, POS Sales and Stock Reconciliation.**

A supplier delivery is received at the central store. Stock is captured into the system, issued to an outlet, sold through the POS, deducted from inventory, reconciled at end-of-day, and reported to management. The bidder must also demonstrate invoice capture / automation, payment processing, reporting, user access controls and relevant system integrations.

**Scenario 2: Conference catering transaction and reconciliation**

A conference or event catering requirement is created for a specific outlet. Menu items or packages are selected, pricing is applied, and the transaction is processed through the POS using the applicable payment method, such as card, voucher, corporate account or purchase-order billing. The system must demonstrate how sales are recorded, stock is deducted, payment is reconciled, and event-level reporting is generated for management review.

### Activities to be Demonstrated

Bidders must demonstrate the following:

1. POS sale processing for restaurant, event and conference catering transactions.

2. Multiple payment types, including card, voucher, mobile / QR, corporate account and purchase-order billing where applicable.
3. Offline trading capability and automatic synchronization once connectivity is restored.
4. Menu, product and package setup, including pricing, modifiers, discounts, void controls and event-specific pricing where applicable.
5. Goods receiving at the central store against a purchase order or delivery note.
6. Stock issuing from the central store to an outlet or event service point.
7. Outlet-level stock visibility and stock movement tracking.
8. Recipe-based or item-based stock deduction linked to POS sales and conference catering packages.
9. Waste, shrinkage, variance and stock reconciliation reporting.
10. Purchase order generation and approval workflow, including mobile / tablet / web-based approval where available.
11. Invoice scanning / OCR / AI automation or integration with invoice automation tools.
12. Payment reconciliation, including end-of-day reconciliation by payment type.
13. Real-time dashboards, cash-up reports, VAT reports, stock valuation reports and consolidated management reports.
14. Event-level reporting by outlet, service point, product category, payment type and transaction reference.
15. Integration approach, including finance, procurement, event booking / Rendezvous, online ordering, payment gateway and invoice automation integrations.
16. User access controls, approval workflows, audit trails, segregation of duties, data security and compliance controls.
17. Hardware functionality, including POS terminals, tablets / mobile devices, barcode scanners, printers and payment devices where applicable.
18. Support process, incident logging, escalation, SLA reporting and system maintenance approach.

## Demo Scoring Criteria

| Criteria Description | Points Allocation | Weighting |
|---|---|---|
| **1. POS Functional Demonstration** | No criteria met = 0 points<br>Less than 3 criteria met = 4 points<br>Less than 5 criteria met = 7 points<br>All or more than 5 criteria met = 10 points | 15 |
| The bidder must demonstrate: | | |
| 1. Multi-outlet POS functionality. | Less than 3 criteria met = 5 points | |
| 2. Dine-in, takeaway and event / conference sales. | | |
| 3. Multiple payment types. | Less than 5 criteria met = 7 points | |
| 4. Split billing, discounts, refunds and void controls. | | |
| 5. Menu and product management. | All or more than 5 criteria met = 10 points | |
| 6. Offline trading and synchronisation. | | |
| **2. Inventory and Centralized Store Demonstration** | No criteria met = 0 points<br>Less than 4 criteria met = 4 points<br>Less than 7 criteria met = 7 points<br>All or more than 7 criteria met = 10 points | 20 |
| The bidder must demonstrate: | | |
| 1. Goods receiving at central store. | | |
| 2. Stock issuing to outlets. | Less than 4 criteria met = 5 points | |
| 3. Outlet-level stock visibility. | | |
| 4. Stock transfers and returns. | | |
| 5. Recipe-based or item-based stock deduction. | Less than 7 criteria met = 7 points | |

| | | |
|---|---|---|
| 6. Waste, shrinkage, expiry or variance tracking.<br>7. Stock reconciliation and stock valuation reports.<br>8. Barcode scanning and tablet / mobile stock capture where available. | All or more than 7 criteria met = 10 points | |
| **3. Purchase Order and Approval Workflow** | No criteria met = 0 points<br>Less than 3 criteria met = 4 points<br>Less than 5 criteria met = 7 points<br>All or more than 5 criteria met = 10 points | 10 |
| The bidder must demonstrate:<br>1. Purchase order generation from stock requirement or reorder level. | Less than 3 criteria met = 5 points | |
| 2. Supplier selection.<br>3. PO approval workflow. | Less than 5 criteria met = 7 points | |
| 4. Mobile / tablet / web-based PO approval where available.<br>5. Link between PO, goods receiving, invoice and stock receipting.<br>6. PO status tracking and reporting. | All or more than 5 criteria met = 10 points | |
| **4. Invoice Automation Demonstration** | No criteria met = 0 points<br>Less than 3 criteria met = 4 points<br>Less than 5 criteria met = 7 points<br>All or more than 5 criteria met = 10 points | 10 |

| | | |
|---|---|---|
| | | |
| The bidder must demonstrate: | Less than 3 criteria met = 5 points | |
| 1. Invoice upload via email, scan, mobile capture or direct upload. | | |
| 2. OCR / AI data extraction. | Less than 5 criteria met = 7 points | |
| 3. User verification and correction. | | |
| 4. Approval workflow. | All or more than 5 criteria met = 10 points | |
| 5. Duplicate detection or exception management. | | |
| 6. Export to finance, ERP, procurement, POS or inventory system. | | |
| **5. Reporting and Management Information** | No criteria met = 0 points<br>Less than 3 criteria met = 4 points<br>Less than 6 criteria met = 7 points<br>All or more than 6 criteria met = 10 points | 10 |
| The bidder must demonstrate: | | |
| 1. Real-time sales dashboard. | Less than 3 criteria met = 5 points | |
| 2. Cash-up and payment reconciliation reports. | | |
| 3. VAT reports. | | |
| 4. Stock movement and stock valuation reports. | Less than 6 criteria met = 7 points | |
| 5. Waste, variance and exception reports. | | |
| 6. Consolidated management reports. | | |
| 7. Export to Excel, CSV or PDF. | All or more than 6 criteria met = 10 points | |

| | | |
|---|---|---|
| **6. System Integration Demonstration / Explanation** | No criteria met = 0 points<br>Less than 4 criteria met = 4 points<br>Less than 7 criteria met = 7 points<br>All or more than 7 criteria met = 10 points | |
| The bidder must demonstrate or clearly explain: | | |
| 1. Integration architecture. | | |
| 2. API / connector capability. | | |
| 3. Integration with finance system. | Less than 4 criteria met = 5 points | 15 |
| 4. Integration with procurement / PO system. | | |
| 5. Integration with event booking / Rendezvous where required. | Less than 7 criteria met = 7 points | |
| 6. Integration with online ordering / e-commerce platform. | | |
| 7. Integration with payment gateway / acquirer. | | |
| 8. Integration timelines, costs, dependencies and responsibilities. | All or more than 7 criteria met = 10 points | |
| **7. Payment Processing and Security Compliance** | No criteria met = 0 points<br>Less than 4 criteria met = 4 points<br>Less than 7 criteria met = 7 points<br>All or more than 7 criteria met = 10 points | |
| The bidder must demonstrate or provide evidence of: | | 10 |
| 1. Integrated card payment terminals. | | |
| 2. Debit, credit, contactless, mobile wallet, QR and voucher payments where applicable. | Less than 4 criteria met = 5 points | |
| 3. End-of-day reconciliation by payment type. | Less than 7 criteria met = 7 points | |

| | | |
|---|---|---|
| 4. Transaction-level audit trail linking POS transactions to payment / settlement records. | | |
| 5. PCI DSS compliance where applicable. | | |
| 6. PCI PTS-approved payment terminals where applicable. | | |
| 7. EMV chip and contactless payment compliance where applicable. | | |
| 8. Payment processing architecture diagram. | All or more than 7 criteria met = 10 points | |
| **8. Ease of Use and Operational Fit** | No criteria met = 0 points<br>Less than 3 criteria met = 4 points<br>Less than 6 criteria met = 7 points<br>All or more than 6 criteria met = 10 points | |
| The bidder must demonstrate: | | |
| 1. User-friendly POS interface. | | |
| 2. Ease of menu updates. | Less than 3 criteria met = 5 points | 5 |
| 3. Ease of stock receiving, issuing and stock take. | | |
| 4. Tablet / mobile usability. | | |
| 5. Simple reporting access. | Less than 6 criteria met = 7 points | |
| 6. Role-based user access. | | |
| 7. Training requirements and learning curve for operational users. | All or more than 6 criteria met = 10 points | |
| **9. Support, Maintenance and SLA Demonstration** | No criteria met = 0 points<br>Less than 3 criteria met = 4 points<br>Less than 6 criteria met = 7 points | 5 |

| | | |
|---|---|---|
| | All or more than 6 criteria met = 10 points | |
| The bidder must demonstrate or explain: | | |
| 1. Helpdesk process. | | |
| 2. Incident logging. | Less than 3 criteria met = 5 points | |
| 3. Escalation process. | | |
| 4. Response and resolution times. | | |
| 5. Remote and onsite support. | Less than 6 criteria met = 7 points | |
| 6. Software update and patching process. | | |
| 7. Hardware support and replacement process. | All or more than 6 criteria met = 10 points | |
| Total (%) | | 100 |

**Presentation Evaluation Notes**

1. The presentation / demonstration must be conducted using the bidder's proposed solution or a representative demonstration environment.
2. Bidders must clearly identify any functionality that is native, third-party, optional, customised, still under development or dependent on additional licensing.
3. Bidders must disclose any integration, hardware, payment provider, hosting or licensing dependencies during the demonstration.
4. A generic slide presentation without a practical system demonstration may result in a lower score.
5. CSIR reserves the right to request clarification, additional evidence or a follow-up demonstration where required

## Annexure D

## Pricing Schedule

**RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years**

**RFP No.**

### 1. Pricing Instructions

1. All prices must be quoted in South African Rand (ZAR).
2. Prices must be firm for the contract period and must include all costs necessary to supply, implement, configure, integrate, test, commission, support and maintain the proposed solution.

| No. | Deliverable | Qty | Unit Price VAT Excl. | Year 1 VAT Excl. | Year 2 VAT Excl. | Year 3 VAT Excl. | Year 4 VAT Excl. | Year 5 VAT Excl. | Total VAT Excl. | Total VAT Incl. |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | POS software licence or subscription for all required outlets (the bidder must clearly indicate the applicable licence whether pricing is per outlet, per user, per device or site license) | 1 | | | | | | | | |
| 2 | Cloud hosting, on-premises server, database hosting, backup or related infrastructure | 1 | | | | | | | | |
| 3 | Fixed or mobile POS terminals for F&B units | 6 | | | | | | | | |
| 4 | Mobile POS devices or tablets for waiter ordering (The bidder must specify the brand, model, screen size, operating system, technical specifications, warranty and compatibility with the solution). | 2 | | | | | | | | |
| 5 | Kitchen display screens | 1 | | | | | | | | |
| 6 | Kitchen printers | 2 | | | | | | | | |
| 7 | Receipt printers for each POS point | 6 | | | | | | | | |
| 8 | Barcode scanners for stock control | 3 | | | | | | | | |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| 9 | Inventory management functionality for all F&B units, including centralised store functionality including goods receipting, stock issuing, transfers and reconciliation | 1 | | | | | | | | |
| 10 | Invoice automation software including OCR, AI extraction, verification workflow and export to finance systems | 1 | | | | | | | | |
| 11 | Integration with booking system | 1 | | | | | | | | |
| 12 | System design, configuration, user roles, menu setup, outlet setup and workflow configuration | 1 | | | | | | | | |
| 13 | Installation, testing, commissioning and go-live preparation | 1 | | | | | | | | |
| 14 | Support during testing, issue resolution and sign-off | 1 | | | | | | | | |
| 15 | Training for all users, including User guides, SOPs, quick reference guides and training material (Cost per day for all users training) | 1 | | | | | | | | |
| 16 | Ongoing support and maintenance for the contract period, including after-hours, weekend or emergency support | 1 | | | | | | | | |
| 17 | After-hours, weekend or emergency support, where applicable (Bidder to indicate the hourly rate and disclose any minimum charge, standby fee or additional cost). | 1 | | | | | | | | |
| 18 | Remote support call-out fee, as and when required. The bidder must indicate the rate per remote support call-out and clearly state the duration included in the call-out rate | 1 | | | | | | | | |
| 19 | On-site support call-out fee, as and when required. Bidder to specify what | 1 | | | | | | | | |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | is included in the call-out rate and identify any additional hourly, travel or related charges. | | | | | | | | | |
| 20 | System updates, patches and upgrades | 1 | | | | | | | | |
| 21 | Hardware maintenance, warranty and replacement support | 1 | | | | | | | | |
| 22 | Tally rolls, printer ribbons, or other POS consumables. The bidder must list each consumable item separately and indicate unit price per item per month | 100 | | | | | | | | |
| Subtotal | | | | | | | | | | |
| **Contingency 10%** | | | | | | | | | | |
| Vat @ 15% | | | | | | | | | | |
| Total | | | | | | | | | | |

## Annexure E

### Proposal Form and List of Returnable Documents

**RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years RFP No. 3788/27/11/2026**

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. 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.

**VALIDITY PERIOD**

CSIR requires a validity period of 120 [one hundred and twenty 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, prior to expiry thereof, on the same terms and conditions, if the internal evaluation process has not been finalised within the validity period.

**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**

**CSIR has defined minimum administrative pre-qualification criteria that must be met by a bidder. The table below contains pre-qualification documents that are required as part of the bidder's proposal, which must be completed and signed by the duly authorised representative of the bidder.**
**Failure to provide any Mandatory Returnable Documents as a form of such prequalification criteria 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 | Repository for submission on EBSP | SUBMITTED [Yes/No] |
|---|---|---|
| In the case of Joint Ventures, bidder must submit a copy of the **signed** Joint Venture Agreement. | Mandatory | |
| In the case of subcontracting arrangements, bidder must submit a copy of the **signed** subcontracting agreement. Where the subcontracting agreement has not been finalised, the bidder must submit a signed letter of intent or preliminary agreement and signed subcontracting agreement would be submitted within seven (7) days upon request. | Mandatory | |
| Annexure D: Pricing Schedule | Mandatory | |
| Where the bidder is not the Original Equipment Manufacturer (OEM) of the proposed POS solution and/or associated hardware, the bidder must submit a valid OEM authorization letter, reseller/partner authorization letter, or other formal confirmation from the OEM | Mandatory | |

| | | |
|---|---|---|
| confirming that the bidder is authorized to supply, implement, support and/or maintain the proposed solution. | | |

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 TECHNICAL SCORING | Repository for submission on EBSP | SUBMITTED [Yes/No] |
|---|---|---|
| POS Functionality | Technical | |
| Inventory and Centralized Store Management | Technical | |
| System Integration Capability | Technical | |
| Reporting and Management Information | Technical | |
| Invoice Automation Capability | Technical | |
| Implementation Methodology | Technical | |
| Support, Maintenance and Service Levels | Technical | |
| Security, Compliance and Governance | Technical | |
| Company Experience | Technical | |
| References | Technical | |

| ESSENTIAL RETURNABLE DOCUMENTS USED FOR PRICE AND SPECIFIC GOALS (PREFERENECE POINT) SCORING | Repository for submission on EBSP | SUBMITTED [Yes/No] |
|---|---|---|
| **Annexure D**: Pricing Proposal / Pricing Schedule or Bill of Quantities | Pricing and B-BBEE | |
| **Annexure G**: Preference Points Award Form in Terms of the Preferential Procurement Regulations 2022 (Mandatory documents to claim preference points)<br>• Valid copy of B-BBEE certificate/ sworn affidavit<br>✓ In case of unincorporated trust, consortium or joint venture, they must submit their consolidated B-BBEE scorecard with their **individual B-BBEE Certificate or Sworn Affidavit**.<br>✓ In case of sub-contracting both parties must submit copies of their valid B-BBEE certificates.<br><br>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 **be invalid**, the joint venture scorecard will also be invalid. | Pricing and B-BBEE | |

**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

| **OTHER ESSENTIAL RETURNABLE DOCUMENTS** | | **Repository for submission on EBSP** | **SUBMITTED [Yes/No]** |
|---|---|---|---|
| **Annexure A**: Standard Bidding Document (SBD) 1 Form | | Technical and Other Essential | |
| **Annexure E**: Proposal Form and List of Returnable documents *(This document)* | | Technical and Other Essential | |
| **Annexure F**: Certificate of Acquaintance with RFP, Terms & Conditions & Applicable Documents | | Technical and Other Essential | |
| **Annexure H**: Standard Bidding Document (SBD) 4 Form | | Technical and Other Essential | |
| **Annexure I**: RFP Declaration and Breach of Law Form | | Technical and Other Essential | |
| **Annexure J**: Mutual Non-Disclosure Agreement | | Technical and Other Essential | |
| **Completed** RFP Document | | Technical and Other Essential | |
| | | Technical and Other Essential | |
| **Estimated Delivery Lead-Time for Item(s) or man-days for completion of project** | | Technical and Other Essential | |
| | | Technical and Other Essential | |

**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

**RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years**

**RFP No. 3788/27/11/2026**

**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

### RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years

**RFP No. 3788/27/11/2026**

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

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

---

### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to this bid:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).
- 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 |
| **Total points for Price and Preference Points must not exceed** | **100** |

1.4 Failure on the part of a Bidder to submit proof of preference points together with the bid, will be interpreted to mean that preference points are not claimed.

1.5 The CSIR reserves the right to require of a Bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the CSIR.

**2. POINTS AWARDED FOR PRICE**

2.1 **The 80/20 preference points systems**

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

**80/20**

$$Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = 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 | 15 |

| Specific Goals | Preference Points |
|---|---|
| Reconstruction and Development Programme (RDP) Goals[1] | 5 |
| **Total** | **20** |

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

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

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

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

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

| RDP Goals | % of Preferential points |
|---|---|
| RDP Goals met | 100% |
| RDP Goals not met | 0% |

### 3.4. Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture[2,] will qualify for preference points as a legal entity (Incorporated), provided that the entity submits its valid B-BBEE certificate. Only valid B-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

[1] 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.

[2] 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.

structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid. Only valid consolidated B-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.

- The agreement must contain the following minimum information:
    - identification of each party to the agreement in full;
    - the percentage ownership of the joint venture of each party to the agreement (if applicable);
    - the precise functions and responsibilities which each party will fulfil in terms of the agreement. This should include details of the delimitations of scope within the goods and services to be assigned to such a party(ies);

37.4.1 the anticipated percentage of the revenue that the party(ies) would receive (anticipated revenue that the party(ies) would receive as a percentage of the total revenue the Bidder would anticipate receiving over the term of the agreement with CSIR), should the Bidder be successful; and

37.4.2 clearly set out the roles and responsibilities of the Lead Partner and the remainder of the joint venture parties. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party(ies) in respect of matters pertaining to the joint venture.

### 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.

- The agreement must contain the following minimum information:
    - identification of each party to the agreement in full;
    - the percentage ownership of the joint venture of each party to the agreement (if applicable);
    - the precise functions and responsibilities which each party will fulfil in terms of the agreement. This should include details of the delimitations of scope within the goods and services to be assigned to such a party(ies);

37.4.3 the anticipated percentage of the revenue that the party(ies) would receive (anticipated revenue that the party(ies) would receive as a percentage of the total revenue the Bidder would anticipate receiving over the term of the agreement with CSIR), should the Bidder be successful; and

37.4.4 clearly set out the roles and responsibilities of the Lead Partner and the remainder of the joint venture parties. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party(ies) in respect of matters pertaining to the joint venture.

## 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 B-BBEE certificate/ sworn affidavit to claim Black Ownership and RDP (QSEs) preference points[3] | | |

**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

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

side) rule has been applied; and

(e) forward the matter for criminal prosecution.

v) If the CSIR is of the view that a Bidder submitted false information regarding a specific goal, it must—

(a) inform the Bidder accordingly; and

(b) give the Bidder an opportunity to make representations within 14 days as to why the tender may not be disqualified or, if the tender has already been awarded to the Bidder, the contract should not be terminated in whole or in part.

vi) After considering the representations referred to in subregulation (v)(b), the CSIR may, if it concludes that such information is false—

(a) disqualify the Bidder or terminate the contract in whole or in part; and

(b) if applicable, claim damages from the Bidder.

| | |
|---|---|
| WITNESSES<br>(a) ……..<br>(b) ……. | ……<br>SIGNATURE(S) OF BIDDERS(S)<br>DATE: …….. |

## Annexure H

## Standard Bidding Document (SBD) 4
## RFP No. 3788/27/11/2026
## 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[4] 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 |
|---|---|---|
| | | |
| | | |
| | | |

[4] 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 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES** ☐ **/NO** ☐

2.2.1 If so, furnish particulars:

……

……

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

2.3.1 If so, furnish particulars:

……

……

## 3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However,

communication between partners in a joint venture or consortium[5] will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

I 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

**RFP for the Provision for Implementation and Support of an Integrated Point of Sale (POS), Inventory Management and Invoice Automation Solution to the CSIR For a Period of Five (5) Years**

**RFP No. 3788/27/11/2026**

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:

_____

_____

Indicate nature of relationship with CSIR:

_____

_____

**[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:

_____

_____

_____

_____

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<br>_____<br>duly authorised hereto | AS WITNESS: |
|---|---|
| Name: | Name: |
| Position: | Position: |
| Signature: | Signature: |

| | |
|---|---|
| Date | Registration No of Company/CC |
| Place | Registration Name of Company/CC |

# MUTUAL NON-DISCLOSURE AGREEMENT

## 1 PREAMBLE

The Parties as identified in Annexure A attached hereto are engaged in discussions relating to their potential collaboration and are therefore required to disclose Confidential Information to one another. They have agreed to do so subject to the terms and conditions as set out herein

## 2 DEFINITIONS

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

2.1.1 **"Background Intellectual Property"** shall mean any Intellectual Property which was owned or controlled by a Party prior to the Effective Date of this Agreement;

2.1.2 **"Confidential Information"** shall mean all Intellectual Property, 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 aforegoing, "Confidential Information" shall include any information that falls within the definition of 'Personal Information' and 'Intellectual Property'.

2.1.3 "**Disclosing Party**" shall mean the Party disclosing Confidential Information under this agreement;

2.1.4 "**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);

2.1.5 **"Effective Date'** shall mean the date of the commencement of this agreement as indicated in Annexure "A";

2.1.6 **"Field"** shall mean the definition of what is deemed to be confidential as indicated in Annexure "A"

2.1.7 **"Intellectual Property"** means inventions, patent applications and patents; branding and trademarks, service marks, trade names and business names (whether or not registered); copyright and works of authorship; registered and unregistered designs; trade secrets and know-how; software and algorithms; databases and protectable collections of information; domain names and web presence; procedures, protocols and methodologies; advertising and promotional material; and all tangible and intangible representations and manifestations thereof;

2.1.8 "**Notice**" shall mean a written document addressed by one Party to the other and either delivered by hand; sent per registered post or electronically mailed to the addresses as indicated in Annexure "A";

2.1.9 **"Other Party"** means the other party in this agreement not the CSIR.

2.1.10 **"Party"** means the CSIR or the Other Party;

2.1.11 **"Parties"** means both the CSIR and the Other Party;

2.1.12 **"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 ("POPIA");

2.1.13 **"Receiving Party"** shall mean the Party receiving Confidential Information under this Agreement;

2.1.14 **"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 CONFIDENTIALITY AND PROTECTION OF PERSONAL INFORMATION

3.1 Save as provided in this clause (Confidentiality and Protection of Personal Information), each Party shall, and shall procure that its Affiliate and their respective officers, directors, employees, agents, auditors and advisors shall, treat as confidential all information relating to the other Party or its Affiliates thereof or relating to their respective businesses that is of a confidential nature and which is obtained by that Party in terms of, or arising from the implementation of this Agreement, which may become known to it by virtue of being a Party, and shall not reveal, disclose or authorise the disclosure of any such information to any third party or use such information for its own purpose or for any purposes other than those related to the implementation of this Agreement.

3.2 The obligations of confidentiality in this clause shall not apply in respect of the disclosure or use of such information in the following circumstances:

3.2.1 in respect of any information which is previously known by such Party (other than as a result of any breach or default by any Party or other person of any agreement by which such Confidential Information was obtained by such Party);

3.2.2 in respect of any information which is in the public domain (other than as a result of any breach or default by either Party);

3.2.3 any disclosure to either Party's professional advisors, executive staff, board of directors or similar governing body who (i) such Party believes have a need to know such information, and (ii) are notified of the confidential nature of such information and are bound by a general duty of confidentiality in respect thereof materially similar to that set out herein.

3.2.4 any disclosure required by law or by any court of competent jurisdiction or a forum of a similar nature

3.2.5 any disclosure made by a Party made in accordance with that Party's pursuit of any legal remedy.

3.2.6 any disclosure by a Party to its shareholders or members pursuant to any reporting obligations that Party may have to its shareholders or members, provided that each such shareholder or member is notified of the confidential nature of such information and is bound by a general duty of confidentiality in respect thereof materially similar to that set out herein;

3.3 If a Party is required to disclose Confidential Information as contemplated in this clause, such Party shall:

3.3.1 advise any Party/ies in respect of whom such information relates (the "Relevant Party/ies") in writing prior to disclosure, if possible;

3.3.2 take such steps to limit the disclosure to the minimum extent required to satisfy such requirement and to the extent that it lawfully and reasonably can;

3.3.3 afford the Relevant Party/ies a reasonable opportunity, if possible, to intervene in the proceedings;

3.3.4 comply with the Relevant Party/ies' reasonable requests as to the manner and terms of such disclosure; and

3.3.5 notify the Relevant Party/ies of the recipient of, and the form and extent of, any such disclosure or announcement immediately after it was made.

3.4 Either Party may, by notice in writing, be entitled to demand the prompt return of the whole or any part of any Confidential Information supplied by it to the other Party, and each Party hereby undertakes to comply promptly with any such demand.

3.5 In line with the provisions of Protection of Personal Information Act, No 4 of 2013 (POPIA), particularly section 20 and 21, the Parties (referred to as Operator(s) in POPIA), depending on who shares and who received Personal Information, shall observe the following principles when processing Personal information on behalf of the other (referred to as Responsible Party in POPIA):

3.5.1 shall only act on the other party's documented instructions, unless required by law to act without such instructions;

3.5.2 shall ensure that its representatives processing the information are subject to a duty of confidence;

3.5.3 shall take appropriate measures to ensure the security of processing; The party which processes Personal information must establish and maintain the security measures referred to in section 19 of POPIA. The Parties shall ensure that they have minimum Information Technology and or physical security safeguard to protect Personal Information.

3.5.4 The Parties must notify each other immediately, where there are reasonable grounds to believe that the Personal Information of a data subject has been accessed or acquired by any unauthorised person

3.5.5 The Parties shall only engage a sub-operator with the other party's prior authorisation and under a written contract.

3.5.6 considering the nature of processing and the information available, the Parties shall use best endeavours to assist each other in meeting POPIA

obligations in relation to the security of processing, the notification of Personal Information breaches and data protection impact assessments and more specifically in relation to Section 20(1).

3.5.7 the Parties shall delete or return all Personal Information to the other upon expiry of the contract, unless the law requires its storage; and

3.5.8 the Parties shall submit to audits and inspections

## 4 INTELLECTUAL PROPERTY

4.1 Ownership of any Background Intellectual property vests exclusively in the Party that developed and shall remain vested exclusively in that Party for the duration of this Agreement and thereafter, unless agreed otherwise between the Parties in writing.

## 5 COMPLIANCE WITH LAWS AND COMMITMENT TO ANTI-BRIBERY AND ANTI-SLAVERY

5.1 **Laws** - The Parties commit to comply with all applicable local, national, and international laws and regulations affecting the execution of this Agreement and their business operations in general. This includes, but is not limited to securities laws, tax laws, licensing and permitting laws and those related to bribery, corruption, and prohibited business practises.

5.2 **Anti-Corruption** - No Party, nor any of their directors, officers, employees, agents, or any other persons acting on behalf of the Party, shall offer, give, receive, or solicit any item of value, in order to influence the actions of an official in the performance of his/her duties, or to gain any commercial, contractual, or regulatory advantage for the Parties in any way that is illegal or unethical.

5.3 **Anti- Slavery** - The Parties undertake to prohibit any form of modern slavery from their operations and for the duration of this contract. The Parties agree to take reasonable steps to understand their supply chains with the view to reduce the risk of modern slavery in their supply chains.

5.4 **Sanctions** - The Parties also agree to comply with all applicable sanctions and embargoes imposed by the United Nations, European Union or the United States. This includes refraining from engaging in transactions with individuals, organizations, or countries that are subject to such restrictions. Parties must promptly notify each other upon discovery that their ability to perform the contract is or will be affected by government sanctions or embargoes. Full disclosure of the relevant details shall be made to enable informed decision-making.

## 6 EXCLUSIONS

6.1 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:

6.1.1 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;

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

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

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

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

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.

## 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 two (2) 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 in the attached annexure A.

## 11 NOTICES

11.1 Any Notice to be given hereunder shall be given in writing or electronic mail and addressed to the relevant party at its *domicilium citandi et executandi* address as chosen in Annexure "A". Any notice delivered personally or sent by electronic mail 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 and Annexure "A" comprise 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 trademark, mark or trade description applied to goods, other than with the consent of the CSIR.

13.6 With due regard to the obligations contained herein in relation to Confidential Information and the Intellectual Property rights of both Parties, 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.)

13.7 Notwithstanding 13.6 above, the Parties undertake to deal with each other in good faith, and not intentionally cause harm to the other party's business dealings, strategic partnerships or collaborations.

## 14 SIGNATURE AND EXECUTION

14.1 The Parties consent to the use of electronic signatures to conclude this Agreement in accordance with the Electronic Communications and Transactions Act 25 of 2002.

14.2 The Parties record that it is not required for this Agreement to be valid that a Party initial each page hereof, or to have its signature to this Agreement verified by a witness.

# ANNEXURE A: MUTUAL NDA

**15 PARTIES TO THE NDA**

**THE CSIR**, a statutory council, duly established under Act 46 of 1988 through its Operating Unit of _____ and Institutions herein represented by _____ in his capacity as _____ and he being duly authorised thereto; **and**

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

**16 CONTACT DETAILS FOR PURPOSES OF CLAUSE 10:**

**16.1 The CSIR**

Physical Address:
Building 43, Meiring Naude Road, Brummeria, Pretoria, 0002
FOR ATTENTION: Sandile Nene (snene@csir.co.za)

Postal Address:
PO BOX 395, Pretoria, 0001
FOR ATTENTION: Sandile Nene (snene@csir.co.za)

**16.2 ……**
Physical Address:
Postal Address;
Email:
FOR ATTENTION:

**17 EFFECTIVE DATE: _____**

**18 THE FIELD: ……**

18.1

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

1. ……
2. ……

……

FOR THE CSIR

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

1. ……
2. ……

……

FOR

……