



REQUEST FOR PROPOSAL

FOR

**APPOINTMENT OF A SERVICE PROVIDER FOR THE CONFIGURATION AND
ENHANCEMENT OF THE SAGE CRM SYSTEM**

AT

TECHNOLOGY INNOVATION AGENCY (TIA)

83 LOIS AVENUE

LYNNWOOD RIDGE

PRETORIA



1. INTRODUCTION

Technology Innovation Agency (TIA) an entity of the Department of Science Technology and Innovation (DSTI) was established in terms of the TIA Act (Act No. 26 of 2008), with the objective to stimulate and intensify technological innovation in order to improve economic growth and the quality of life of all South Africans by developing and exploiting technological innovations, as the value chain depicted below.

The Technology Innovation Agency implemented a CRM System (Sage CRM) as a central point of contact for all stakeholder and customer complaints, escalations, enquiries, queries, funding support and general information required. The system also comprises of TIA stakeholder database and events calendar.

2. PURPOSE

The objective is to appoint a Service Provider to assist with the SAGE CRM system maintenance, support and configuration as and when required.

3. SCOPE OF WORK

All Service Providers are required to submit quotations for the following requirements:

- Maintenance and support of the SAGE CRM system as configured (customised according to TIA processes).
- Enhance current workflows developed for escalation to relevant business units of customer/stakeholder complaints or enquiries.
- Development of any new workflows required for operational efficiency.
- Support the internal resources for the management of calls logged escalations to Business Units including notifications.
- Maintenance of CRM reports and creation of new ones as requested.

4. Duration of the contract

The contract for the service provider will be for a period of 36 months. We anticipate that a resource might be required for an estimated duration of 15 hours per month but might vary over the period of 36 months.

5. Billing

Service providers are required to quote services on hourly rate for one developer. Billing must be on a Time and Material basis as and when required according to the hourly rate quoted. Invoices will be submitted and paid monthly informed by a Time Sheet.

6. SUBMISSION OF PROPOSALS

5.1 The proposals should be submitted to mapule.msiza@tia.org.za.

5.2 It is the responsibility of the prospective supplier to ensure that the proposal is submitted by no later than **19 December 2024**

5.3 TIA reserves the right to disregard responses received after the specified due date.

7. ENQUIRIES & RESPONSES

All Enquiries and Responses must be addressed to mapule.msiza@tia.org.za.

8. MEDIUM OF COMMUNICATION

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

9. VERIFICATION OF DOCUMENTS BY THE SERVICE PROVIDERS

- 8.1. Respondents should check their proposal and satisfy themselves that none of the pages are not missing. No liability will be accepted by TIA regarding anything arising from the fact that pages are missing or proposals are incomplete.

10. GENERAL TERMS AND CONDITIONS

- 9.1. The Respondent is responsible for all costs incurred in the preparation and submission of the quotes.

- 9.2. Kindly note that TIA is entitled to:

9.2.1. Amend any RFQ conditions, validity period, specifications, or extend the closing date and/or time of RFQs before the closing date. All Respondents, to whom the RFQ documents have been issued, will be advised in writing of such amendments in good time;



- 9.2.2. Verify any information contained in a proposal;
- 9.2.3. Not to appoint any bidder;
- 9.2.4. Vary, alter, and/or amend the terms of this RFQ, at any time prior to the finalisation of its adjudication hereof;
- 9.2.5. An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a proposal, or cancellation of any subsequent contract.
- 9.2.6. TIA reserves the right not to accept the lowest proposal or any proposal in part or in whole. TIA normally awards the contract to the Bidder who proves to be fully capable of handling the contract and whose Proposal is technically acceptable and/or financially advantageous to TIA. Appointment as a successful contractor 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 within process from the appointment date, TIA shall be entitled to appoint the contractor who was rated second, and so on.
- 9.2.7. TIA also reserves the right to award this RFQ as a whole or in part without furnishing reasons.
- 9.2.8. TIA also reserves the right to cancel or withdraw from this RFQ as a whole or in part without furnishing reasons and without attracting any liability.
- 9.2.9. The Bidder hereby offers to render all of the services described in the attached documents (if any) to TIA on the terms and conditions and in accordance with the specifications stipulated in this RFQ documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein).
- 9.2.10. The invoicing and payment will be made once the service has been executed.
- 9.2.11. This proposal and its acceptance shall be subject to the terms and conditions contained in this RFQ document.

11. MANDATORY REQUIREMENTS

- 10.1 Service provider must be registered in the Central Supplier Database.
- 10.2 Service provider must be tax compliant by the time TIA appoints.
- 10.3 CV of Developer proposed to be attached.
- 10.4 3 x Reference Letters where similar work was done on Sage CRM
- 10.5 Developer experience: 4+ years' experience in configuration of Sage CRM systems.

12. EVALUATION CRITERIA

- 11.1** In addition to the requirements as stated, all proposals will be evaluated based on evaluation criteria below, and the 80/20 preferential point system.

No	Evaluation criteria	Scoring guide	Weighting	Max score
11.1.1	Developer experience: 4+ years' experience in configuration of Sage CRM systems.	4 years or above = 5 Less than 4 years' experience = 0	0.50	5
11.1.2	References: 3 x Reference Letters where similar work was done in configuring of Sage CRM systems.	Details of previous work experience and 3 contactable references (Reference letter must be attached) 5 = 3 references and more, 4 = 2 references, 3 = 1 references,	0.25	5

No	Evaluation criteria	Scoring guide	Weighting	Max score
		0 = no reference.		
11.1.3	CV of Developer proposed to be attached.	CV containing qualifications and work experience of Sage CRM systems 5 = CV Submitted with Sage CRM systems experience 0 = No CV Submitted or qualifications/previous jobs not relevant	0.25	5
Maximum possible score / Total weight score			1	
Minimum qualifying weighted score (expressed as percentage)				70%

11.2 Evaluation in terms of Preference Points System

Service providers who score 100% for will be evaluated further based on the Preference point system

Specific Goal	Points	Proof
At least 51% Black women ownership	10	Share register/ certificate
Less than 51% black women ownership	0	



At least 50% of the company is owned by youth	10	ID documents
Less than 50% of the company is owned by youth	0	
Price	80	Quotation
Specific goals	20	



13. ANNEXURE B: SERVICE AND PRICING

12.1.	Pricing Calculation		
Description	Duration	Hours per month	Price
Developer Price per Hour	36 Months	15	
Overall Total inclusive of VAT			

SBD4 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 interest¹ 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

¹ 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 consortium² 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

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.



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.

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

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{min} = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$

Where

P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the

conditions of this tender:

- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

(Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
At least 51% Black women ownership	10			
Less than 51% black women ownership	0			
At least 50% of the company is owned by youth	10			
Less than 50% of the company is owned by youth	0			



DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I 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 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering 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 tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.



.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:
.....
.....
.....