



Companies Tribunal

a member of **the dtic**

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TERMS OF REFERENCE:

APPOINTMENT OF A SERVICE PROVIDER TO IMPLEMENT AN ODOO SYSTEM (DMS & CRM)

RFQ NUMBER: 1291

CLOSING DATE: 22/05/2026 @11H00

VALIDITY PERIOD: 60 DAYS

NB: On the last page of this document the bidder needs to declare and indicate that they have read and understood the document in full.

NB: Proposals must be submitted via email to scm@companiestribunal.org.za

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1. INVITATION

The Companies Tribunal is inviting experienced service providers to submit their proposals to install, configure and deploy the ODOO System at the Tribunal.

2. BACKGROUND

The Companies Tribunal (the Tribunal) is an agency of the Department of Trade, Industry and Competition (**the dtic**). The Tribunal is established in terms of the Companies Act No 71 of 2008 (the Act) and its role is to adjudicate on applications and make orders in terms of the Act as well as resolve disputes through mediation, conciliation and arbitration.

3. SCOPE OF WORK

- **Service Provider should ensure that they:**

- Supply and implementation of the required solution
- Provide for the end-to-end delivery of the integrated solution
- Provide maintenance and support of the system
- Supply and activate licenses
- Configure the system to be accessible online
- Configure the system to utilise MFA and SSO and Active Directory integration
- Migrate data from existing systems
- Where possible and beneficial, integrate the solution with existing organisational systems
- Provide training to administrators and end-users
- Provide user manuals and training materials
- Develop service level agreements (SLAs) for response and resolution times
- Provide system updates, patches, and enhancements

4. DELIVERABLES

- **Service Provider should implement the following:**

I. DOCUMENT MANAGEMENT SYSTEM (DMS)

- Centralised storage with category hierarchy (File Plan)
- Full-text search (content + metadata)
- Support all types of file format and rich text editor capabilities
- Built-in memorandum templates with auto-dating numbering
- Automatic versioning control
- Workflows and role-based approvals
- Workflows status tracking
- Digital Signature integration and verification checks
- Audit logs (created, edited, viewed, signed, approved)
- Role-based access control (RBAC) and document-level permissions settings
- Data at rest and in transit encryption
- Secure external sharing with expiry settings
- Email notifications, reminders and escalation alerts

II. CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

- Auto-generated query reference number
- Anonymous reporting option
- Severity levels (Low, Medium, High, Critical)
- Automated task assignment
- Track due dates, completion and escalation rules for overdue queries
- Capture investigation notes and reports
- Internal discussions via collaboration tools
- Email notifications and reminders
- Confidential Query handling and role-based access control (RBAC)
- Outstanding vs closed queries and management escalation alerts

III. OTHER MODULES

- **The following modules will be configured and deployed once the DMS and CRM are fully implemented, tested and stabilized**
 - a) HELPDESK MODULE
 - b) MARKETING MODULE
 - c) HR MODULE
 - d) PROJECT MODULE
 - e) SIGNATURE MODULE

5. GENERAL REQUIREMENTS

- The bidders must submit a detailed company profile, detailing the history and background.
- Provide a list of clients for whom similar services were rendered in the past 5 years and screenshots of similar projects undertaken.
- CVs of the project manager and the team to be responsible for handling the Tribunal portfolio.
- Contact details of at least five references from among recent clients with whom a similar job has been conducted.

6. EVALUATION PROCESS

the Tribunal will evaluate all proposals in terms of the Preferential Procurement Policy Framework Act. No. 5 of 2000 (PPPFA). 3 phase evaluation criteria will be considered in evaluating the bid as follows:

a. **Phase 1: Pre-Qualification Criteria (Mandatory requirements)**

This stage checks and validates the bidder's compliance with legal requirements to conduct business with the government of South Africa.

All proposals duly lodged will be examined to determine compliance with bidding requirements and conditions (completion and attachment of compulsory documents). NB: No points will be allocated to this stage; however,

bidders that do not comply with the Mandatory requirements below will be disqualified and will not advance to the next stage of evaluation.

Pre-Qualification Requirements	Check list √ Tick each box
SBD 1: Completed, attached and signed	
SBD 3.1: Completed, attached	
SBD 4: Completed, attached and signed	
SBD 6.1: Completed, attached and signed	
Terms of Reference document: Completed, attached and signed	
General Conditions of Contract: Initialled and attached	
Proof of registration on Central Supplier Database (managed by National Treasury) a report not older than a month of the date of submission must be submitted	

Note: All SBD forms must be submitted (signed) noting where it is not applicable. If any specific SBD form is not submitted, documentary proof clearly stating the reasons must be attached.

Failure to adhere to the above conditions will invalidate the proposal.

Bidders must also supply the following documents (where applicable).

Other Requirements	Check list √ Tick each box
Valid B-BBEE Certificate or (attach certified copy) or Sworn Affidavit	
Company Registration documents	

b. Phase 2: Functional/Technical Evaluation

Only bidders that have met the pre-qualification criteria will be evaluated for functional evaluation. In this phase the evaluation will be based on the bidder's responses in respect of the bid proposal. Prospective bidders who score a minimum of **70** points or more will be considered for the next phase 3 (Pricing and Specific Goals).

All proposals will be evaluated for functionality as follows:

Technical (Functionality) proposal		Maximum points to be awarded
1.	Company Information and relevant experience: <ul style="list-style-type: none"> • History/background of the bidder including the number of years in operation specializing in the implementation of ODOO System. <ul style="list-style-type: none"> ○ 1 – 4 years = 5 points ○ 5 – 10 years = 15 points ○ 11 – 15 years = 20 points ○ 16 years and above = 30 points 	30
2.	Competency requirements: <ul style="list-style-type: none"> • Provide a list of at least five (5) projects and screenshots of similar projects undertaken. 	15
	<ul style="list-style-type: none"> • Provide CV(s) and certified copies of qualifications for the project manager and project team members experienced in deploying ECM/DMS solutions. <ul style="list-style-type: none"> ○ At least NQF Level 6 in ICT and Project Management certificate ○ 5 yrs relevant experience 	10
3.	Technical: <ul style="list-style-type: none"> • Proposal conforms to the scope and deliverables of this specification • Provide a detailed Project Plan: <ul style="list-style-type: none"> ○ Project Management Methodology ○ Project Phases ○ Project Activities ○ Timelines ○ Resource Allocations 	25
4.	Reference: <ul style="list-style-type: none"> • Provide written and contactable reference letters from clients where a similar service has been rendered. <ul style="list-style-type: none"> ○ 1-3 reference letters – 2 points ○ 4 -5 reference letters – 5 points ○ 6 and above reference letters – 15 points 	15
5.	Supply/Commencement: <ul style="list-style-type: none"> • Demonstrate ability to commence with the project within two (2) weeks of appointment. 	5
Total technical points		100
Minimum threshold for technical (functionality)		70

A point scoring system would be utilized as follows:

Score	Description
1	Does not meet requirements, or no information supplied.
2	Meet some of the requirements
3	Almost meet all requirements
4	Fully meet all requirements
5	Exceeds all requirements

c. Phase 3: Price and Specific Goals

- All quotations up to the rand value of R 50 000 000.00 including all applicable taxes will be evaluated on the 80/20 principle as prescribed by the Preferential Procurement Policy Framework Act 5 of 2000 and its Regulations.
- **NB** - Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids to substantiate their specific goal as stated below. However, Bidders who do not submit B-BBEE Status Level Verification Certificates do not qualify for specific goals points, but they will not be disqualified from the bidding process.
- The lowest acceptable price will score 80 points, the 20 specific goals points will be allocated as follows:

SPECIFIC GOAL	TOTAL POINTS
Percentage (%) Black Ownership	Points (10)
91-100	10
81-90	9
71-80	8
61-70	7
51-60	6
41-50	5
31-40	4
21-30	3
11-20	2
1-10	1
0	0
Percentage (%) Ownership By Women	Points (4)
81-100	4
51-80	3

SPECIFIC GOAL	TOTAL POINTS
31-50	2
1-30	1
0	0
Percentage (%) Ownership By Youth	
81-100	4
51-80	3
31-50	2
1-30	1
0	0
Percentage (%) Ownership By People living With Disability	
51-100	2
1-50	1
0	0

7. VALIDITY OF PROPOSALS

- The Supplier is required to confirm that it will hold its proposal valid for **60 days** from the closing date of the submission of proposals.
- In exceptional circumstances, CT may solicit the bidder's consent to an extension of the period of the validity of the bid. The request and responses thereto shall be made in writing.

8. PROPOSAL SUBMISSION REQUIREMENTS

- All compulsory documents as stated under point 6 above.
- The bid proposal as per point 3 above
- In case of joint ventures, bidders must provide a clear agreement regarding joint venture/consortia.
- A trust, consortium or joint venture must submit a consolidated B-BBEE status level verification certificate.
- No late bids will be considered.

Proposals must be **emailed to** scm@companiestribunal.org.za

9. PRICING

- Only a firm pricing schedule will be accepted for this tender (Completed form SBD 3.1)
- The quoted price should be in South African Currency and must include all taxes.
- The quoted price must be valid for a period of 60 days from the closing date of the bid.
- The Tribunal will not be liable for any cost incurred in the preparation of proposals.
- Payment will be made within 30 days after receipt of the valid original tax invoice.

10. DISCLAIMER

The Tribunal reserves the right to

- Award the contract or any part thereof to one or more service providers
- Reject all bids
- Decline to consider any bids that do not conform to any aspect of the bidding process
- Request further information from any service provider after the closing date, for clarification purpose
- The Tribunal reserves the right at any time to visit the premises of the bid proposer if deemed necessary to ensure security of the information.
- Any false declaration of information will result in the exclusion of the bid proposal from consideration.

11. NOTES TO BIDDERS

This section outlines basic requirements that must be met. Failure to meet these requirements or part thereof may result in your proposal being excluded from the evaluation process


- Proposal documents must be submitted to the Tribunal
- The Tribunal will not be liable for any cost incurred by the bidder in the preparation of proposals
- Evaluation of proposals will be carried out by the Tribunal. The Bid Evaluation Committee will, if necessary, contact bidders to seek clarification on any aspect of the proposals.
- Service providers must sign the register at the reception when the proposal is submitted

11. ENQUIRIES

Technical: Kaykay Sebokoane (012) 394 3587 OR e-mail to ksebokoane@companiestribunal.org.za

Supply Chain Management: Dikeledi Ratlhogo (012) 394 3680 OR email SCM@companiestribunal.org.za

12. APPROVAL

Approval			
	Name and Title	Signature	Date
Approved by:	MI MATHATHO ACTING COO		28/04/2026

13. DECLARATION BY THE BIDDER

I, (Full names) the undersigned
certify that the information provided is true and correct, and understood the contents of the document in full.

SIGNATURE :

DATE: