



**ESTATE AGENCY AFFAIRS BOARD
OF SOUTH AFRICA**

INVITATION TO BID

BID REFERENCE NUMBER: RFP – CCE/2021/007

**TERMS OF REFERENCE FOR SUPPLY, INSTALLATION AND MAINTENANCE OF HOSTED VOIP
PABX (TELEPHONY) AND CALL CENTRE MANAGEMENT SYSTEM
FOR A PERIOD OF 3 YEARS FOR**

NATIONAL TREASURY CENTRAL SUPPLIER DATABASE (CSD) REGISTRATION INFORMATION

Company Name	Supplier registration number	
		Main contractor
		Sub-contracted/ joint venture comp 1 Sub-contracted/ joint venture comp 1
		Sub-contracted/ joint venture comp 1 Sub-contracted/ joint venture comp 2

BRIEFING SESSION: No Briefing session

Estate Agency Affairs Board, 63 Wierda Road East, Wierda Valley , Sandton ,2196

CLOSING DATE OF THE BID: 22 December 2021 at 12h00

Any enquiries must be in writing and can be directed to:

Bidding enquiries contact Joseph.Setloboko on infotenders@eaab.org.za

Technical enquiries contact Ms Thokozani Khumalo on Thokozani.Khumalo@eaab.org.za

Bid No.:Name of
Bidder.....

DOCUMENTS IN TENDER DOCUMENT PACK

Bidders are to ensure that they have received all pages of this document, which consist of the following:

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Bid No.:Name of
Bidder.....

PART A : INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFP- CCE/2021/007	CLOSING DATE:22 December 2021		CLOSING TIME:	12:00 PM
BID DESCRIPTION	Implementation of an Enterprise Resource Planning (ERP) solution for EAAB				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Estate Agency Affairs Board, 63 Wierda Road East, Wierda Valley, Sandton, 2196					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Joseph Setloboko		CONTACT PERSON	Thokozani Khumalo	
TELEPHONE NUMBER	(011) 731-2209		TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	infotenders@eaab.org.za		E-MAIL ADDRESS	Thokozani.Khumalo@eaab.org.za	
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
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?				<input type="checkbox"/> YES <input type="checkbox"/> 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.					

Bid No.:Name of
Bidder.....

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, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

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:

Bid No.:Name of
Bidder.....

SBD 3.3

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:BID NO.:

CLOSING TIME 12:00 PM

CLOSING DATE:22 December 2021

OFFER TO BE VALID FOR ...180.....DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
------------	-------------	--

1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION

HOURLY RATE

DAILY RATE

.....
.....
.....
.....
.....

R.....
R.....
R.....
R.....
R.....

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

.....
.....
.....
.....

R..... days
R..... days
R..... days
R..... days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED

RATE

QUANTITY

AMOUNT

.....
.....
.....
.....

..... R.....
..... R.....
..... R.....
..... R.....

TOTAL: R.....

Bid No.:Name of
Bidder.....

** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....
TOTAL: R.....			

6. Period required for commencement with project after acceptance of bid
7. Estimated man-days for completion of project
8. Are the rates quoted firm for the full period of contract? *YES/NO
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
.....
.....
.....

*[DELETE IF NOT APPLICABLE]

Bid No.:Name of
Bidder.....

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:

2.2 Identity Number:

2.3 Position occupied in the Company (director, trustee, shareholder²):

2.4 Company Registration Number:

2.5 Tax Reference Number:

2.6 VAT Registration Number:

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹"State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder
presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person
connected to the bidder is employed :

Bid No.:Name of
Bidder.....

Position occupied in the state institution:

Any other particulars:
.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:
.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:
.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9. 1If so, furnish particulars.
.....
.....
.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.
.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members **YES/NO**

Bid No.:Name of
Bidder.....

of the company have any interest in any other related companies
whether or not they are bidding for this contract?

2.11.1 If so, furnish particulars:

.....
.....
.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number / Personal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23
OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

1. THE NATIONAL INDUSTRIAL PARTICIPATION PROGRAMME

Bid No.:Name of
Bidder.....

This document must be signed and submitted together with your bid

INTRODUCTION

The National Industrial Participation (NIP) Programme, which is applicable to all government procurement contracts that have an imported content, became effective on the 1 September 1996. The NIP policy and guidelines were fully endorsed by Cabinet on 30 April 1997. In terms of the Cabinet decision, all state and parastatal purchases / lease contracts (for goods, works and services) entered into after this date, are subject to the NIP requirements. NIP is obligatory and therefore must be complied with. The Industrial Participation Secretariat (IPS) of the Department of Trade and Industry (DTI) is charged with the responsibility of administering the programme.

2.1. PILLARS OF THE PROGRAMME

- 2.1.1. The NIP obligation is benchmarked on the imported content of the contract. Any contract having an imported content equal to or exceeding US\$ 10 million or other currency equivalent to US\$ 10 million will have a NIP obligation. This threshold of US\$ 10 million can be reached as follows:
- (a) Any single contract with imported content exceeding US\$10 million. or
 - (b) Multiple contracts for the same goods, works or services each with imported content exceeding US\$3 million awarded to one seller over a 2 year period which in total exceeds US\$10 million. or
 - (c) A contract with a renewable option clause, where should the option be exercised the total value of the imported content will exceed US\$10 million. or
 - (d) Multiple suppliers of the same goods, works or services under the same contract, where the value of the imported content of each allocation is equal to or exceeds US\$ 3 million worth of goods, works or services to the same government institution, which in total over a two (2) year period exceeds US\$10 million.
- 2.1.2. The NIP obligation applicable to suppliers in respect of sub-paragraphs 5.1.1 (a) to 5.1.1 (c) above will amount to 30 % of the imported content whilst suppliers in respect of paragraph 5.1.1 (d) shall incur 30% of the total NIP obligation on a *pro-rata* basis.
- 2.1.3. To satisfy the NIP obligation, the DTI would negotiate and conclude agreements such as investments, joint ventures, sub-contracting, licensee production, export promotion, sourcing arrangements and research and development (R&D) with partners or suppliers.
- 2.1.4. A period of seven years has been identified as the time frame within which to discharge the obligation.

2.2. REQUIREMENTS OF THE DEPARTMENT OF TRADE AND INDUSTRY

- 2.2.1. In order to ensure effective implementation of the programme, successful bidders (contractors) are required to, immediately after the award of a contract that is in excess of **R10 million** (ten million Rands), submit details of such a contract to the DTI for reporting purposes.
- 2.2.2. The purpose for reporting details of contracts in excess of the amount of R10 million (ten million Rands) is to cater for multiple contracts for the same goods, works or services; renewable contracts and multiple suppliers for the same goods, works or services under the same contract as provided for in paragraphs 5.1.1.(b) to 5.1.1. (d) above.

2.3. BID SUBMISSION AND CONTRACT REPORTING REQUIREMENTS OF BIDDERS AND SUCCESSFUL BIDDERS (CONTRACTORS)

- 2.3.1. Bidders are required to sign and submit this Standard Bidding Document (SBD 5) together with the bid on the closing date and time.

Bid No.:Name of
Bidder.....

2.3.2. In order to accommodate multiple contracts for the same goods, works or services; renewable contracts and multiple suppliers for the same goods, works or services under the same contract as indicated in sub-paragraphs 5.1.1 (b) to 5.1.1 (d) above and to enable the DTI in determining the NIP obligation, successful bidders (contractors) are required, immediately after being officially notified about any successful bid with a value in excess of R10 million (ten million Rands), to contact and furnish the DTI with the following information:

- Bid / contract number.
- Description of the goods, works or services.
- Date on which the contract was accepted.
- Name, address and contact details of the government institution.
- Value of the contract.
- Imported content of the contract, if possible.

2.3.3. The information required in paragraph 5.3.2 above must be sent to the Department of Trade and Industry, Private Bag X 84, Pretoria, 0001 for the attention of Mr Elias Malapane within five (5) working days after award of the contract. Mr Malapane may be contacted on telephone (012) 394 1401, facsimile (012) 394 2401 or e-mail at Elias@thedti.gov.za for further details about the programme.

2.4. PROCESS TO SATISFY THE NIP OBLIGATION

2.4.1. Once the successful bidder (contractor) has made contact with and furnished the DTI with the information required, the following steps will be followed:

- a) the contractor and the DTI will determine the NIP obligation;
- b) the contractor and the DTI will sign the NIP obligation agreement;
- c) the contractor will submit a performance guarantee to the DTI;
- d) the contractor will submit a business concept for consideration and approval by the DTI;
- e) upon approval of the business concept by the DTI, the contractor will submit detailed business plans outlining the business concepts;
- f) the contractor will implement the business plans; and
- g) the contractor will submit bi-annual progress reports on approved plans to the DTI.

2.4.2. The NIP obligation agreement is between the DTI and the successful bidder (contractor) and, therefore, does not involve the purchasing institution.

Bid number Closing date:

Name of bidder.....

Postal address

.....

Signature..... Name (in print).....

Date.....

Bid No.:Name of
Bidder.....

Bid No.:Name of
Bidder.....

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- 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 The value of this bid is estimated to **not exceed R50 000 000** (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser 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 purchaser.

2. DEFINITIONS

- (a) **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **"B-BBEE status level of contributor"** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **"bid"** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;

- ### 3. POINTS AWARDED FOR PRICE

3.1 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

$$P_s = 80 \left(1 - \frac{Pt - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{Pt - P_{\min}}{P_{\min}} \right)$$

Where

Ps = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

Bid No.:Name of
Bidder.....

POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 3.2 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

4. BID DECLARATION

- 4.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

5. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 5.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

6. SUB-CONTRACTING

- 6.1 Will any portion of the contract be sub-contracted?

(***Tick applicable box***)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- 6.1.1 If yes, indicate:

- What percentage of the contract will be subcontracted.....%
- The name of the sub-contractor.....
- The B-BBEE status level of the sub-contractor.....
- Whether the sub-contractor is an EME or QSE

(***Tick applicable box***)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

Bid No.:Name of
Bidder.....

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

7. DECLARATION WITH REGARD TO COMPANY/FIRM

7.1 Name of company/firm:.....

7.2 VAT registration number:.....

7.3 Company registration number:.....

7.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

7.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....
.....
.....
.....

7.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

7.7 Total number of years the company/firm has been in business:.....

7.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown 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 1

Bid No.:Name of
Bidder.....

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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser 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 side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

WITNESSES

1.

2.

.....
SIGNATURE(S) OF BIDDERS(S)

DATE:

CONTRACT FORM - PURCHASE OF GOODS/WORKS

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SUCCESSFUL BIDDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SUCCESSFUL BIDDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE BIDDER)

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to (name of institution)..... in accordance with the requirements and specifications stipulated in bid number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
 - (i) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Technical Specification(s);
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination
 - Special Conditions of Contract;
 - (ii) General Conditions of Contract; and
 - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES

1

CONTRACT FORM - PURCHASE OF GOODS/WORKS

PART 2 (TO BE FILLED IN BY THE PURCHASER)

1. I..... in my capacity as.....
accept your bid under reference numberdated.....for the supply of goods/works
indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating delivery instructions is forthcoming.
3. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of the
contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

ITEM NO.	PRICE (ALL APPLICABLE TAXES INCLUDED)	BRAND	DELIVERY PERIOD	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

4. I confirm that I am duly authorised to sign this contract.

SIGNED ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

--

WITNESSES

1.

CONTRACT FORM - RENDERING OF SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

7. I hereby undertake to render services described in the attached bidding documents to (name of the institution)..... in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number..... at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid .
8. The following documents shall be deemed to form and be read and construed as part of this agreement:
- (iv) Bidding documents, viz
 - Invitation to bid;
 - Tax clearance certificate;
 - Pricing schedule(s);
 - Filled in task directive/proposal;
 - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
 - Declaration of interest;
 - Declaration of bidder's past SCM practices;
 - Certificate of Independent Bid Determination;
 - Special Conditions of Contract;
 - (v) General Conditions of Contract; and
 - (vi) Other (specify)
9. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
10. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
11. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
12. I confirm that I am duly authorised to sign this contract.

NAME (PRINT)

CAPACITY

SIGNATURE

NAME OF FIRM

DATE

WITNESSES

1

Bid No.:Name of
Bidder.....

SBD 7.2

CONTRACT FORM - RENDERING OF SERVICES

PART 2 (TO BE FILLED IN BY THE PURCHASER)

4. I..... in my capacity as.....
accept your bid under reference numberdated.....for the rendering of services
indicated hereunder and/or further specified in the annexure(s).
5. An official order indicating service delivery instructions is forthcoming.
6. I undertake to make payment for the services rendered in accordance with the terms and conditions of the
contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION	MINIMUM THRESHOLD FOR LOCAL PRODUCTION AND CONTENT (if applicable)

4. I confirm that I am duly authorised to sign this contract.

SIGNED ATON.....

NAME (PRINT)

SIGNATURE

OFFICIAL STAMP

WITNESSES

1

Bid No.:Name of
 Bidder.....

SBD 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.

- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

Bid No.:Name of
Bidder.....

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME).....
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME
SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

Bid No.:Name of
Bidder.....

SBD 9

6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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 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.

Bid No.:Name of
Bidder.....

SBD 9

10. 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.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Bid No.:Name of
Bidder.....

PART 2 - TERMS OF REFERENCE (TOR)



**ESTATE AGENCY AFFAIRS BOARD
OF SOUTH AFRICA**

TERMS OF REFERENCE FOR SUPPLY, INSTALLATION AND MAINTENANCE OF HOSTED VOIP PABX (TELEPHONY) AND CALL CENTRE MANAGEMENT SYSTEM FOR A PERIOD OF 3 YEARS FOR THE ESTATE AGENCY AFFAIRS BOARD

INTRODUCTION

EAAB MANDATE

The Estate Agency Affairs Board ('the Board') was established in 1977, pursuant to the provision of the Estate Agency Affairs Act, 112 of 1976 ("the Act"), with the mandate to regulate and control certain activities of estate agents in the public interest. The EAAB regulates the estate agency profession by ensuring that all persons carrying out the activities of an estate agent as a service to the public are registered with EAAB. A Fidelity Fund Certificate, which is to be renewed each year, is issued as evidence of such registration and confirmation that such person is legally entitled to carry out the activities of an estate agent.

Bid No.:Name of
Bidder.....

The EAAB is a schedule 3A public entity in terms of the Public Finance Management Act, reporting to the Department of Human Settlements, Water and Sanitation (DHS) as its Executive Authority. The EAAB is therefore committed to Broad Based Black Economic Empowerment Act 55 of 2003 and the Codes of Good Practice.

The primary mandate of the EAAB is built on five key regulatory pillars, namely:

- a) Regulate, Maintain and promote the standard of conduct of estate agents having due regard to the public interest;
- b) Issue Fidelity Fund Certificates to qualifying applicants;
- c) Prescribe the standard of training of estate agents;
- d) Investigate complaints against and institute disciplinary proceedings against offending estate agents where required; and
- e) Manage and control the Estate Agents Fidelity Fund.

PURPOSE

The Estate Agency Affairs Board (EAAB) is currently undergoing a Modernisation Programme which focuses on the transformation of processes, technology and human capabilities to further enhance current operations, increase operational efficiencies and improve quality of service offered to its clients in respect of their call centre services.

The EAAB therefore is looking for proposals to supply, install and maintain a hosted VOIP PABX and Contact/Call Centre Management Systems.

The EAAB call/Contact/Call Centre workforce is mainly located at our head office in Sandton with the capability of transferring calls to regional office.

The provided solution must:

- Provide Computer Telephony Integration (CTI) functionality and the configuration thereof;
- Provide integration to the EAAB's Customer Relations Management and backend systems, including the sourcing of data from the EAAB's Data;
- Integrate with other channels (e.g. SMS, WhatsApp, Facebook, Instagram ,Fax and email) available to clients (Estate Agents, members of the public and general Stakeholders) for interaction with the EAAB;
- The hosted or on premise VOIP PABX solution must integrate seamlessly with existing technologies

Bid No.:Name of
Bidder.....

such as Active Directory, Microsoft Exchange and Skype for business as and when required.

- Be cloud based; and
- The service provider must provide a service based solution.

SCOPE OF WORK

The service provider is required to provide the following products and services to the EAAB:

A cloud-based call centre solution should comprise the following:

- A Cloud based Contact/Call Centre solution integrated with CRM system and social media channels to give a single view of the customer across all channels.
- It must provide a complete platform that logically screens and routes all customer collaborations;
- The system should help with analysing trends. It must also ensure a seamless experience for the customer.
- The service provider needs to offer a complete customer interaction platform that is flexible, scalable and reliable.
- The solution must cater for hunting capability.
- It must be possible for agents to positively and efficiently interact with customers via any channel. The customer interface must be instinctive and easy to navigate
- The provision should be made for 10 licenses and allow for scalability based on capacity and the need.

Interactive Voice Recordings (IVR)

- The configuration of IVR must be easy and user-friendly, it should be plug and play. No specialised technician(s) should be needed to set it up.
- It must be possible to change the flow and interactive voice responses within a short time period if required.
- Must be able to override or amend routing strategies when emergencies or other unexpected situations occur.
- IVR to make provision for choice for self-service by customer (voice portals for self-service applications, including speech- enabled self-service), or speaking to an agent.
- The Service Provider must assist with configuring the IVR when implementing the system. Initial set-up of IVR must be done according to EAAB needs.

Automatic Call Distributor (ACD) and computer/telephony integration

- The Automatic Call Distributor (ACD) needs to ensure that customer requests are either resolved with self-service or routed according to specific skillsets/requirements. A tiered approach must be possible.
- Must be a seamlessly integrated interactive voice recording system (IVR). Routing strategies must be created and maintained across all channels.
- The IVR and ACD to be integrated and built into the Contact/Call Centre platform so that agents won't need to repeatedly request a customer's account or phone number.
- ACD should be able to read the caller's number then pull call history for the same number.

Computer Telephony Integration (CTI)

- CTI must display the relevant customer details on the Contact/Call Centre agent desktop when it delivers a call and such display must be customisable.
- Reference numbers for calls need to be created for later retrieval/referencing of call history, including voice recording.

Text to speech (TTS)

- A program must be available to convert text into spoken voice output, to assist with recording of IVR messages (English).
- TTS needs to provide a human-like and personalized user experience.

Analytics

- The system needs to provide for Interaction analytics to assist with extracting all possible insight from within the Contact/Call Centre. This includes phone calls, web chat, social media and/or WhatsApp. The purpose is to get to the root cause of repeat calls, giving insight into problem areas, streamlining business processes and improve customer services.
- Text and speech analytics

Bid No.:Name of
 Bidder.....

Recording of calls

- All calls need to be recorded.
- Contact/Call Centre management must be able to retrieve the required call recording based on different search criteria like call reference number, date, time of call, number from which call was received, agent name to etc.
- All records should be stored within the EAAB's data store, and the solution needs to have capabilities of integrating at a data level with other EAAB systems.
- Notification to be sent via email when calls are missed.

Quality Management

- Customers should have an option to rate the quality of the service provided at the end of the call.
- The system should monitor calls that take too long and alert team leader for assistance, if any needed.
- Evaluation form - Score sheet/coaching forms to be completed online by supervisors based on specific calls and routed to Contact/Call Centre agents.
- Agent self-evaluations.
- Performance Management. System linked to reports and quality management to enable easy performance management of agents based on quantitative and qualitative performance.
- There must be provision for monitoring, whispering and barging functionalities available for supervisors and the manager.
- Managers must be able to monitor Contact/Call Centre performance any time from a mobile device or desktop.

Collaborative browsing

- The ability to co-browse/share the customer's screen, and permission for screen sharing should be browser-based on the client-side.

Activity Codes

- Ability for agents to type in activity codes (e.g. when busy with coaching, meetings, tea times etc.) to enable accurate statistics.

Bid No.:Name of
Bidder.....

Self-Service for Calls

- Self-service: provision for the Contact/Call Centre system to integrate/interface with EAAB systems for application status, annual returns calculations etcetera.

Omni channel Experience

- The Contact/Call Centre platform must allow EAAB to activate/deactivate different channels as needed. All channels should be accessible on one dashboard.
- The complete customer journey must be tracked, including interactions across multiple channels.
- The Omni channel experience should support and store all records of calls, voicemails, whatsapp, SMS, web chats, social media information and all other data and notes in a single system.

Social Media Tool – to route all interactions which require responses from specific staff and manage all social media interaction.

- Social media like Facebook and Twitter must be included. Others must be able to “plug in” as per new social media developments.
- It must be possible to draw statistics of when requests were received, when it was responded to, who responded, how long it took to respond, status of requests etc.

Webchat Facility

- Functionality to set up according to specific categories.
- Reports and analytics required.
- Moderators to review responses.
- Ability to attach picture of file to the chat.
- The web chat should have an intelligent chat bot – it should come with the facility or as a plug-in and the cost shall be borne to the service provider.
- Visitor monitoring and pro-active chat
- The chat bot should interface with EAAB systems using tracking number, entity registration number or customer pin to retrieve application information etc.
- The web chat should allow monitoring, whispering and barging by the supervisor.

Bid No.:Name of
 Bidder.....

Wallboards/Dashboards

- Visibility on all agents and activity should be available from one screen (single 'virtual Contact/Call Centre view).
- Adherence must be monitored by using wallboards, which must be set up/configured according to user requirements.
- Contact/Call Centre agents must be provided with customised desktops to guide them through customer interactions. The solution must be flexible so that EAAB is able to alter the user-interface itself (it must not be difficult where extra time and resources must be spend to configure the solution).
- Dashboard for each agent with individual agent statistics. Dashboards on each agent desktop must be available to enable them to view their individual progress and statistics (e.g. number of calls offered, answered, received, calls waiting, waiting time etc. per agent). Agent self-management is important.

Surveys

- After session surveys (for all channels). The purpose is to gain insight, optimize the experience at the interaction and big picture level.
- After session surveys must be easy to set up, draw reports from and to upload revised surveys.
- Option to ask customer if they would like to participate in the survey – either all customers, or option to choose a random percentage of customers.
- Analytics and report required based on surveys – per agent.
- Multi-channel surveys.

Reports/Statistics

- The system should generate reports in tabular, graphical, pdf, word and excel or csv format
- Reports need to include agent performance, service levels, application and skillset performance.
- Real-time reporting, as well as historical reporting.
- Call detail records – reports to indicate where callers hang up (or abandoned calls).
- Contact/Call Centre agent quality reports
- Custom reporting. Must be able to customise reports according to own business needs. Solution needs to provide database access, as it will enable EAAB to connect to the database and generate custom reporting.

Bid No.:Name of
 Bidder.....

- Reporting should also include call tracking and analytics to link calls and web chats and other channels like social media with the customer's website visits, to be able to measure and report on Contact/Call Centre efficiency.
- Reports must be available with the click of a button.
- Reports should be downloadable, and it must be possible to export reports to Excel or csv.
- Examples of reports need to be submitted as part of the tender documentation.

Headsets

- Headsets and Handsets/IP phones should be supplied by the service provider.

Customer Relationship Management System (CRM)

- Customer insight management. It is important to have a Customer Relationship Management System which can provide a single view of a customer.
- The Contact/Call Centre system must have a capability of integrating with other CRM systems.
- A single view of the customer is essential. Caller must be identified via a unique identifier like a phone number, customer pin. When the call is answered, the agent must already know the name of the customer, their customer pin, customer history, their last enquiry, all interactions with staff, and resolutions already provided.
- Phone numbers of customers must be matched with chats or any other channel.
- Dashboard - All contact types to be handled through one interface which increases productivity by eliminating toggling between screens.

Reliability and Security

- Data centre(s) for cloud-based systems must be located in South Africa.
- System to ensure the highest standards for security, availability and reliability. (Proper login details verification, keeping audit trail).
- Cloud solution providers should also ensure that the following measures are in place:
- Secure cloud networks and data hosting
- Appropriate data encryption levels and firewall protection
- Strong user authentication
- Regular password changes

Bid No.:Name of
Bidder.....

Up-Time Guarantee

- There should be an uptime guarantee of at least 97%.

Works with any PBX

- The Contact/Call Centre solution must work with any on-premises or cloud PBX (Standard business phone systems).

Installation and configuration of the system

- Service provider to install and configure system as per Contact/Call Centre requirements. The system should be hosted by the service provider and the services provided to EAAB via the cloud and the service providers data centres must be within the borders of the republic of South Africa.
- The application should be accessible via different end-user devices (computer, mobile phones, tablets and any end-user access tool).
- The system should be accessible with all currently available browsers (Internet explorer, Google Chrome, Safari and Firefox).
- The system should be world-call highly available, cost effective and hosted and managed by the service provider.

Enhancements

- Enhancements should be continuously deployed with zero effort for EAAB's ICT department. New features in the solution should be immediately accessible when available.

Maintenance

- Maintenance for a period of three (3) years

Bid No.:Name of
Bidder.....

Support

- Telephonic support should be provided by the service provider during office hours (07:00 – 17:00)
- On-site calls as and when requested. EAAB should not be charged extra for transport to EAAB offices.

Training

- Training must include user training relating to the system.
- First line support training
- In-depth training on reports for six staff members (standard reports, as well as ad hoc reports)
- Manuals to be provided relating to system, as well as reporting.

ICT Infrastructure

- The EAAB requires a detailed technical and architectural requirements document of the solution (Logical and Physical), specifically an illustration of what ICT infrastructure is needed to host parts of the system within the EAAB. Requirements to be indicated to enable EAAB ICT to cater for the solution (i.e. what type of switches and other hardware are required.)

Project Management

- Service provider should include costs for a project management services.
- The resource(s) will report to the EAAB ICT Office.

Integration

- The proposed solution should be integrated to the EAAB services.
- The system should be able to integrate seamlessly with existing EAAB legacy systems, telephony and communications, as well as third party applications within EAAB, without sacrificing performance, reliability or security.
- There should be no recurring per-user monthly fees for integrations with third party systems

Documents and Handover

- The service provider needs to deliver all solution specification documents to EAAB.
- There should be a handover to both business and technical EAAB resources.

Bid No.:Name of
Bidder.....

PRICING

Prospective bidders must submit a comprehensive proposal. The onus is upon the prospective bidders to take into account all costs for the duration and the price must be fixed for the duration of the contract.

- Cost breakdown must be provided, covering all required aspects in this tender.
- Configuration of system, including CRM, integration with EAAB systems, maintenance and support.
- Support should include telephonic support during office hours (07:30 – 16:30)
- On-site support as and when requested during the maintenance period – **Provision should be made for at least 24 hours per month. EAAB should not be charged extra for transport to EAAB offices.**
- Ability to upgrade/scale to allow for additional functionality and/or licenses on pay-as-you-go basis. There should be an option to discontinue with a specific service without a lengthy waiting period if required.
- Costs for upgrading of system for the contract period should be included in the price for the tender.
- Updates should sync seamlessly with the current system and it should not impact business operations.
- The service should not be tied to a location, so that if the organisation needs to relocate to new premises, there should be no costs involved with cancelling the old contract and paying for a new contract, or relocating to the new premises.
- EAAB should not be charged extra for transport to EAAB offices during installation or maintenance

Bid No.:Name of
Bidder.....

and support, or for any meetings.

EVALUATION PROCESS

Proposals will be evaluated on the 80/10 preference points scoring system for the full 3-year period: that is, 80 points awarded will be based on price, and 20 points awarded will be based on B-BBEE codes

Phase 1: Compliance

BID NUMBER:			
BIDDER NAME:			
COMMODITY:	Appointment of a service provider to provide Call Centre/Contact/Call Centre Services to the Estate Agency Affairs Board for a period of Three (3) years on the 80/20 PPPFA.		
CLOSING DATE OF BID:			
REQUIREMENT	COMPLIANT	NON-COMPLIANT	DETAILS / COMMENTS
SBD 1: Part A - Invitation to BID			
SBD 2: Part B - Tax Clearance Certificate			Expiry Date :
SBD 3 Pricing Schedule/ Financial Proposal			Amount: R_____
SBD 4 Declaration of interests			
SBD 6.1 Preference points claim form in terms of the Preferential Procurement Regulations 2017			
SBD 7.2 Contract form (rendering of services)			
SBD 8 Declaration of Bidder's Past Supply Chain Management Practices*			
SBD 9 Certificate of independent bid determination			
B-BBEE Certificate issued by an accredited verification Agency or or SWORN AFFIDAVIT			Expiry Date : _____ Level: _____
CSD Registration no:			
Full Proposal in terms of the TORs			

Bidders who are non-compliant and do not submit the mandatory documentation will be disqualified and not proceed to Phase 2.

Bid No.:Name of
 Bidder.....

Phase 2: Functionality evaluation criteria

CRITERIA	WEIGHT														
<p>Project Implementation Plan- must include the following points:</p> <p>1. How long it will take to start the project after order is received. <i>Points Allocation (10)</i></p> <table> <tr> <th>Criteria</th><th>Points</th></tr> <tr> <td>Delivery within 2 weeks</td><td>10</td></tr> <tr> <td>Delivery within 4 weeks</td><td>5</td></tr> <tr> <td>Delivery 5 weeks and above</td><td>0</td></tr> </table> <p>2. Bidders must provide a comprehensive onsite support warranty for a period of five (5) years with 4 hours' response time. <i>Points Allocation (10)</i></p> <table> <tr> <th>Criteria</th><th>Points</th></tr> <tr> <td>Has the bidder/bidders included maintenance and support for a period of three (3) years with 4 hours response time.</td><td>10</td></tr> <tr> <td>If not</td><td>0</td></tr> </table>	Criteria	Points	Delivery within 2 weeks	10	Delivery within 4 weeks	5	Delivery 5 weeks and above	0	Criteria	Points	Has the bidder/bidders included maintenance and support for a period of three (3) years with 4 hours response time.	10	If not	0	20
Criteria	Points														
Delivery within 2 weeks	10														
Delivery within 4 weeks	5														
Delivery 5 weeks and above	0														
Criteria	Points														
Has the bidder/bidders included maintenance and support for a period of three (3) years with 4 hours response time.	10														
If not	0														
<p>Bidder's years' experience in providing similar solutions</p> <p>Bidder must indicate their years of experience in providing call centre / Contact/Call Centre solutions: <i>Points Allocation (10)</i></p> <table> <tr> <th>Criteria</th><th>Points</th></tr> <tr> <td>Above 8 years' experience</td><td>10</td></tr> <tr> <td>6 to 8 years' experience</td><td>7</td></tr> <tr> <td>2 to 5 years' experience</td><td>5</td></tr> <tr> <td>Less than 2 years' experience</td><td>0</td></tr> </table>	Criteria	Points	Above 8 years' experience	10	6 to 8 years' experience	7	2 to 5 years' experience	5	Less than 2 years' experience	0	10				
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Above 8 years' experience	10														
6 to 8 years' experience	7														
2 to 5 years' experience	5														
Less than 2 years' experience	0														
<p>Reference Letters</p> <p>Bidders are requested to provide the following: Three (3) letters on a letterhead from their clients where hosted or on premises Call Centre Management solutions have recently been implemented with similar</p>	10														

Bid No.:Name of
 Bidder.....

criteria. Bidders must make sure that the letters are signed and the contact details are fully completed.

The contact details must include the contact number and the e- mail address of the referee. The reference must not be older than 12 months from the date of the RFP submission.

Points Allocation (15)

Criteria	Points
3 reference letters	10
2 reference letters	7
1 reference letter	5
No reference letter	0

Note: The EAAB reserves the right to verify the information provided; and if your referee does not confirm the information provided the reference will not be considered.

Project Management Strategy

20

Bidder/s must provide full details of proposed installation for the provision the Call Centre Management Systems for EAAB. Points allocation (20)

Criteria	Points
Detailed Project Management Plan that (i)highlights tasks, (ii)timeframe from placing an order to EAAB receiving the goods, (iii)implementation of professional services, (iv) architectural design of the solution	20
If any of the above in not addressed	0

The bidder must provide a Cloud based Contact/Call Centre solution

5

The bidder must provide a solution that caters for the recording of calls and Interactive Voice Recordings (IVR)

5

The bidder must provide Automatic Call Distributor (ACD) and computer/telephony integration

5

The bidder must provide for a solution that generates Reports/Statistics

5

The bidder must provide a solution that caters for strong security and protection against viruses

5

The bidder must provide a solution that guarantees an uptime of at least 97%.

5

Bid No.:Name of
 Bidder.....

The bidder must provide a solution that allows Customers an option to rate the quality of the service provided at the end of the call.	5
The bidder must provide a solution that caters for social media and webchat facilities	5
TOTAL POINTS	100

Phase 3: Price and BEE

All bidders who scored 80 points and above on Phase 2, will be evaluated on price and BBEE

The price / preference weighting applicable for BID are as follows:

Price / Preference	Weighting percentage
Price	80%
Preference Points	20%
Total	100%

Preference Point allocation – 80/20:

B-BBEE Level	Number of Points
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-Compliant contributor	0

CONTRACT MANAGEMENT

The successful service provider must be prepared to enter into a service level agreement with the EAAB.

The duration of the contract is anticipated to run for a period of three (3) years starting from the date the contract is concluded between the 2 parties. The contract will however be subject to an annual evaluation of performance