



Companies and Intellectual
Property Commission
a member of the **dtic** group

ANNEXURE: “H”

TERMS OF REFERENCE (“TOR”)

CIPC BID NUMBER: 01-2025-2026

**DESCRIPTION: INVITATION TO BIDDERS TO PROVIDE
PROPOSAL FOR THE APPOINTMENT OF
SERVICE PROVIDER TO REVIEW THE CIPC
CALL CENTRE TO ENSURE OPTIMISATION
OF THE CALL CENTRE**

CONTRACT PERIOD: FOUR (4) MONTHS

BID CLOSING DATE: 27 MAY 2025

**NB: IT IS THE RESPONSIBILITY OF THE PROSPECTIVE BIDDERS TO
DEPOSIT TENDERS IN THE CORRECT BOX AND TENDERS DEPOSITED
IN WRONG BOXES WILL NOT BE CONSIDERED.**

**THE CIPC TENDER BOX HAS THE FOLLOWING DESCRIPTION: **“CIPC
TENDER BOX”**.**

TABLE OF CONTENTS

1.	PURPOSE	7
2.	BACKGROUND	7
3.	SCOPE OF WORK	7
8	WORKING CONDITIONS	Error! Bookmark not defined.
9	SPECIAL CONDITIONS	12
10	EVALUATION PROCESS (Criteria).....	13
13	SUBMISSION OF PROPOSALS.....	18
14	ENQUIRIES	18

1. TERMS AND CONDITIONS OF REQUEST FOR TENDER (RFT)

1. CIPC's standard conditions of purchase shall apply.
2. Late and incomplete submissions will not be accepted.
3. Any bidder who has reasons to believe that the RFP specification is based on a specific brand must inform CIPC before BID closing date.
4. Bidders are required to submit an original Tax Clearance Certificate for all price quotations exceeding the value of R30 000 (VAT included). Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of this RFP. Certified copies of the Tax Clearance Certificate will not be acceptable.
5. No services must be rendered or goods delivered before an official CIPC Purchase Order form has been received.
6. This RFP will be evaluated in terms of the **80/20** system prescribed by the Preferential Procurement Regulations, 2001.
7. The bidder must provide assurance/guarantee to the integrity and safe keeping of the information (that it will not amended/corrupted/distributed/permanently stored/copied by the service provider) for the duration of the contract and thereafter. Failure to submit will invalidate the bid proposal.
8. CIPC reserves the right to negotiate with the successful bidder on price.
9. The service provider must ensure that their work is confined to the scope as defined.
10. Travel between the consultant's home, place of work to the DTI (CIPC) vice versa will not be for the account of this organization, including any other disbursements.
11. The Government Procurement General Conditions of contractors (GCC) will apply in all instances.
12. As the commencement of this project is of critical importance, it is imperative that the services provided by the Service Provider are available immediately. Failing to commence with this project immediately from date of notification by CIPC would invalidate the prospective Service Provider's proposal.
13. Appointment will be subject to positive security screening results by the State Security Agency
14. No advance payment(s) will be made. CIPC will pay within the prescribed period as per the PFMA.
- 15. All prices quoted must be inclusive of Value Added Tax (VAT)**
- 16. All prices must be quoted in South African Rand**
- 17. All prices must be valid for one hundred and twenty days (120) days**
18. The successful Service Provider must at all times comply with CIPC's policies and procedures as well as maintain a high level of confidentiality of information.
19. All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner or his/her delegate.
20. The successful bidder must ensure that the information provided by CIPC during the contract period is not transferred/copied/corrupted/amended in whole or in part by or on behalf of another party.
21. Further, the successful bidder may not keep the provided information by way of storing/copy/transferring of such information internally or to another party in whole or part relating to companies and/or close corporation. As such all

information, documents, programs and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner or his delegate.

22. The service provider will therefore be required to sign a declaration of secrecy with CIPC. At the end of the contract period or termination of the contract, all information provided by CIPC will become the property of CIPC and the service provider may not keep any copy /store/reproduce/sell/distribute the whole or any part of the information provided by CIPC unless authorized in terms of the declaration of secrecy.
23. The Service Provider is restricted to the time frames as agreed with CIPC for the various phases that will be agreed to on signing of the Service Level Agreement.
24. CIPC will enter into Service Level Agreement with the successful Service Provider.
- 25. CIPC reserves the right not to award this bid to any prospective bidder or to split the award.**
- 26. Fraud and Corruption:**

The Service Provider selected through this Terms of Reference must observe the highest standards of ethics during the performance and execution of such contract. In pursuance of this policy, CIPC Defines, that for such purposes, the terms set forth will be as follows:

- i. "Corrupt practice" means the offering, giving, receiving or soliciting of anything of value to influence the action of CIPC or any personnel of Service Provider(s) in contract executions.
- ii. "Fraudulent practice" means a misrepresentation of facts, in order to influence a procurement process or the execution of a contract, to CIPC, and includes collusive practice among bidders (prior to or after Proposal submission) designed to establish Proposal prices at artificially high or non-competitive levels and to deprive CIPC of the benefits of free and open competition;
- iii. "Unfair trade practices" means supply of services different from what is ordered on, or change in the Scope of Work;
- iv. "Coercive practices" means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the execution of contract;
- v. CIPC shall reject a proposal for award, if it determines that the bidder recommended for award, has been engaged in corrupt, fraudulent or unfair trade practices;
- vi. CIPC also reserves the right to terminate this Agreement by giving 10 (ten) business days written notice to the service provider due to any perceived (by CIPC) undue reputational risk to CIPC which CIPC can be exposed to resulting from the service provider or its management/directors being found to be involved in unethical behaviour, whether in its dealings with CIPC or any other business dealings.**
Note: "Unethical behaviour" includes but not limited to an action that falls outside of what is considered morally right or proper for a person, a profession or an industry
- vii. CIPC shall declare a Service Provider ineligible, either indefinitely or for a stated period of time, for awarding the contract, if at any time it determines that the Service Provider has been engaged in corrupt, fraudulent and unfair trade practice including but not limited to the above in competing for, or in executing, the contract.



- viii. The service provider will sign a confidentiality agreement regarding the protection of CIPC information that is not in the public domain.

2. **COMPLUSORY BID REQUIREMENTS (FAILURE TO COMPLY WITH ALL REQUIREMENTS BELOW WILL IMMEDIATELY DISQUALIFY THE PROPOSAL)**

INSTRUCTIONS FOR THE SUBMISSIONS OF A PROPOSALS

SUBMISSION OF ORIGINAL HARD COPY

- a) Bidder's must submit **One (1) original copy** (hard printed copy of the technical proposal), this is for record keeping purposes and the USB Only will be used for bids evaluation.
- b) The bid document must be marked with the bidder's name
- c) The bid documents *must be signed* by an authorized employee, agent or representative of the bidder and every page of the proposal shall contain the initials of same signatories (electronic signature acceptable)
- d) All pages of the submitted proposal must be numbered.

SUBMISSION OF USB

a) NO DISC WILL BE ALLOWED

b) ONE (1) USB must be submitted, including technical proposal as well as price proposal saved in separate folders;

- c) The USB must be marked with the bidder's name.
- d) The USB must have an index page/ table of contents listed all documents included in the proposal for easy referencing during evaluation (group information in separate folders)
- e) Open each folder prior submission to ensure that documents are saved and are properly opening and working
- f) BIDDERS TO VERIFY IF DOCUMENTS ARE SUCCESSFULLY LOADED IN THEIR USB'S
- g) **USB'S WITH NO DOCUMENTS INCLUDED WILL BE DISQUALIFIED AS ONLY USB'S ARE USED FOR EVALUATION PURPOSES**
- h) The USB must contain the *exact* documents/ information submitted in the original copy for record keeping
- i) Bidders to ensure that the information is properly saved in the USB prior submitting to CIPC and that there are **no missing pages, USB sticks open, readable, and contain no blank pages, documents, or folders.** *Ensure that each folder created is numbered or documents placed in numbering order, avoid clustering folders with a lot of documents rather create separate folders*
- j) **THE USB WILL BE USED FOR EVALUATION HENCE THE BIDDER IS REQUIRED TO ENSURE THAT THE USB CONTAINS ALL INFORMATION.**

k) CIPC WILL NOT BE HELD LIABLE FOR INCOMPLETE PROPOSALS/ INFORMATION SUBMITTED IN THE USB'S

- l) All pages must be signed, numbered and initial as per the original copy
- m) The USB must be submitted in **PDF format ONLY** and must be **read ONLY, NO Passwords Protection**
- n) bidders to ensure that USBs are working prior submission
- o) Bidders to ensure that USB 's are not password protected
- p) It is the bidder's responsibility to verify if the usb is working before submission
- q) Bidders with USB's not opening or password protected will be disqualified

FAILURE TO COMPLY WITH ALL THE ABOVE-MENTIONED REQUIREMENTS WILL IMMEDIATELY INVALIDATE THE BID.

3. SUBMISSION OF PRICE PROPOSAL

- a) Prospective Bidders must submit a printed hard copy of the Price Proposal in a separate **SEALED** envelope. It is important to separate price from the technical proposal as Price is evaluated at the last phase of the Evaluation.
- b) The price envelop must be marked with the bidder's name
- c) Bidders to complete pricing schedule SBD 3.3 (Annexure "C")- REFER TO ATTACHED SBD FORMS
- d) The total price (*ceiling price*) must be carried over to BOTH SBD 3.3 (Pricing Schedule) and SBD FORM 1: (Invitation for Bids).
AND COMPLIANCE TO ANNEXURE A PAGE 16 and 17
- e) The total bid amount will be used for the evaluation of bids therefore it must be inclusive of all costs for the duration of the contract.
- f) All prices must be VAT inclusive and quoted in South African Rand (ZAR). *Failure to comply with this requirement will disqualify the bid.*
- g) All prices must be valid for 120 days

PLEASE NOTE THAT IT IS COMPULSORY THAT BIDDERS SUBMIT PROPOSAL AS PER THE FOLLOWING

- 1. 1 (ONE) ORIGINAL / HARD COPY PRINTED
- 2. 1 (ONE) USB FOR TECHNICAL PROPOSAL AND PRICE MUST BE INCLUDED IN THE SAME USB BUT SAVED IN A SEPARATE FOLDER ("MARKED PRICE PROPOSAL") BIDDERS TO ENSURE THAT USB'S ARE WORKING PRIOR SUBMISSION
- 3. ONE SEALED ENVELOPE FOR PRICE PROPOSAL (INSIDE THERE MUST BE)
 - ❖ PRICE SCHEDULE – SBD.33: PLEASE TAKE NOTE OF THE CLAUSE IN SBD 3.3 AND ENSURE COMPLIANCE
 - ❖ ALL CONDITIONS OF PRICE FOR EXAMPLE- PRICE FLUCTUATIONS OR PRICES NOT FIRM DUE TO ROE, ETC MUST BE CLEARLY STATED IN SBD 3.3 IN THE SPACE PROVIDED. SEE PAGE 14
 - ❖ SBD1 - INVITATION TO BIDS
 - ❖ PRICE BREAKDOWN PREFERABLE IN THE BIDDER'S LETTERHEAD SIGNED BY AN AUTHORISED REPRESENTATIVE

NB: Bidders must also refer to page 13 of 18 of the terms of reference under Mandatory Requirements

FAILURE TO COMPLY WITH ALL THE ABOVE MENTIONED REQUIREMENTS WILL IMMEDIATELY INVALIDATE THE BID.

Please complete and sign

I, the undersigned (NAME).....certify that:

I have read and understood the conditions of this tender.

I have supplied the required information and the information submitted as part of this tender is true and correct.

.....

Signature

.....

Date

FAILURE TO COMPLY WITH ALL THE ABOVE MENTIONED REQUIREMENTS WILL IMMEDIATELY INVALIDATE THE BID

1. PURPOSE

The CIPC requests a thorough review of its call centre operations with a focus on optimising performance, improving service levels, and enhancing staff wellness.

2. BACKGROUND

The CIPC has an inbound call centre, servicing the whole of South African and even international customers. Since the CIPC Call Centre's establishment, the number of calls has increased year on year, and the staff component did not increase proportionally as well. The call centre is currently facing significant challenges due to high call volumes that exceed its capacity to deliver efficient service. As a result, customers are experiencing long wait times, increased abandonment rates, and reduced service quality, which ultimately threatens customer satisfaction and business reputation. Additionally, agents are dealing with burnout, leading to higher turnover rates and reduced productivity. CIPC required a comprehensive review of the call centre to address these issues.

The primary objectives of the review are to:

- Improve overall service levels and customer experience.
- Analyze staffing levels and optimize staffing levels and efficiency.
- Enhance employee wellness, morale, and job satisfaction.
- Review processes and identify opportunities for continuous improvement.
- Develop and optimize call centre policies, and SOPs.
- Explore the integration of communication channels (e.g., AI, chatbots, social media, webchat). The CIPC does have social media and a chatbot, but it is separate systems and does not function as one integrated system. Review to advise on integrated advanced technology to streamline operations and ensure integrated call centre systems, as well as a single view of the customer and integrated interactions with the back office.

3. SCOPE OF WORK

The service provider is required to review the current CIPC call centre and based on best practices, taking government regulations and acts into consideration, provide recommendations in terms of:

4.1. Staffing and Structure

- a. Evaluate current staffing levels using industry's best practices like forecast call volume, Average Handling time (AHT) etc, determine service level goals, and factor in shrinkage and desired occupancy levels.
- b. Recommend optimal staffing levels and structure, including roles and team hierarchy. Statistics to be evaluated and number of staff to ensure a service level of 90%

4.2. Performance and Wellness: Assess employee wellness and suggest improvements in work-life balance, morale, and retention

- a. Rewards, recognition, and incentive schemes.
- b. Stress management and wellness initiatives.
- c. Coaching and mentoring programs.
- d. Identifying strategies to reduce absenteeism and shrinkage.
- e. Best KPA and KPI for performance management .

4.3. Training and Development

- a. Evaluate current training programs and develop a structured plan for onboarding, continuous skills development, and upskilling staff. This needs to include recommendations on ways to ensure agents stay up to date with CIPC products and services.
- b. Retention Strategies: Provide recommendations to improve retention, job satisfaction, and engagement.

Process Review and Policy Development

- a. Call Centre Processes: Review and optimize current processes, including workflows, Standard Operating Procedures (SOPs), and internal communication channels.
- b. Suggest improvements in efficiency, customer service delivery, and service levels.
- c. Analyze the interaction between the call centre and back office, proposing processes for seamless integration and communication
- d. Quality Assurance: Develop strategies for quality assurance of calls and monitoring first-call resolution, ensuring a focus on customer satisfaction.
- e. Recommend a Call centre policy for CIPC

4.5. Technology and Systems

- a. Propose the best integrated functionalities required of a call centre system to ensure customer satisfaction and easy navigation for call centre agents.
- b. Propose functionalities of a system(s) that will enable CIPC to have a single view of all customer interactions. CIPC currently uses separate systems like a call centre system and another system for social media. We also have several back office systems which



the staff must utilize to assist customers. A single view of the customer is required, including the history of all previous interactions with customers must reflect.

- c. CIPC has several processing systems, including legacy systems. Advise what infrastructure and system integration software may be required to migrate or consolidate information for contact centre efficiency.
- d. Advise on functionalities of systems as well as processes to improve Quality Assurance
- e. Integration of New Channels: Evaluate the integration of digital channels like AI, chatbots, social media, and webchat, and recommend if they should be integrated into the call centre or operated separately.
- f. Knowledge Base and Tools: Recommend the creation of a searchable knowledge base and review tools to enhance operational efficiency and customer interaction management.
- g. Ergonomics: Given the remote working setup, assess ergonomic considerations and provide recommendations for improving the work environment.

4.6. Management Information and Analytics

- a. Data Analytics: Implement advanced analytics, including speech analytics and after-call surveys, to monitor performance and identify areas for improvement.
- b. Reporting and Optimization: Advise on optimizing the use of reports and statistics to guide decision-making, including performance metrics, service levels, and customer feedback.
- c. Wallboards: Recommend strategies to optimize wallboards for better real-time decision-making.

4.7. Transition to a Contact Centre

- a. Feasibility of Transition: Assess the feasibility of transitioning from a call centre to a contact centre, considering the necessary systems, processes, and staffing changes.
- b. Digital Channel Integration: Advise on if it should be integrated, and if so, how to incorporate social media, webchat, and AI/chatbots effectively into the contact centre environment.

1. Deliverables

The expected deliverables from the review are:

- 1. **Staffing and Structural Assessment:** A report analyzing current staffing levels, organizational structure, and recommendations for optimization. The structure must include Quality Assurance staff, staff to do coaching as well as training needs of the call centre.
- 2. **Capacity and Capability Report:** A detailed assessment of current capacity and capability, with recommendations for improvement,
- 3. **Process Re-engineering Report:** A detailed analysis of processes and SOPs with actionable recommendations for improving efficiency.
- 4. **Call Centre Policy:** A comprehensive policy document for managing call centre operations.

5. **Transition Plan to Contact Centre:** A feasibility report and action plan for transitioning to a contact centre, including the integration of digital channels.
6. **Training, Coaching, and Quality Assurance Framework:** Recommendations for staff training, coaching, and a quality assurance framework.
7. **Updated SOPs and KPIs:** Revised SOPs and KPA/KPIs, aligning them with best practices and organizational objectives.
8. **Technology report:** Recommendation on the features that Call centre system/s should have to ensure single view of customer and history of interactions with customers, QA, Speech to text analytics, knowledge base and an integrated system. The report must include recommended management information and analytics tools.
9. **Final review report and presentation to the key stakeholders/Executives.**

10. Timeline

The review process is expected to take approximately 4 months.

11. Reporting and Communication

- Initial data gathering and stakeholder interviews
- Regular progress updates.
- Mid-review report with preliminary findings
- Final review report and **presentation of recommendations**

12. Exposure

The successful bidder must have relevant exposure to the review of and providing recommendations on call centre/ contact centres.

13. Experience

The successful bidder must have over 3-years' experience in the Call/contact Centre field and in call centre consulting services. CVs of staff who will be assigned to the CIPC account must be provided.

14. Reporting

The contracted bidder's account manager will report to the CIPC Senior Manager Client Engagement and e-Communication Mr Thapelo Mokoena and the Call Centre Manager Mrs Magda Swemmer or her delegate.

15. Equipment

N/A

16. Proprietary rights

The proprietary right with regards to copyright, patents and any other similar rights that may result from the service rendered by the resource belong to CIPC.

- The final product of all work done by the resource, shall at the end of service period, be handed over to CIPC.
- The resource may not copy documents and/or information of the relevant systems for any other purpose than CIPC specific.

17. Indemnity / Protection / Safeguard

- The resources safeguard and set CIPC free to any losses that may occur due to costs, damage, demands, and claims that is the result of injury or death, as well as any damage to property of any or all contracting personnel, that is suffered in any way, while delivering a service to CIPC.
- The resources safeguard and set CIPC free to any or all further claims for losses, costs, damage, demands and legal expenses as to the violation on any patent rights, trade marks or other protected rights on any software or related data used by the resources.

18. Government Safety

- The resources attention is drawn to the effect of government Safety Legislation. The resources must ensure (be sure) that relevant steps are taken to notify the person(s) of this requirement.
- The resource must at all times follow the security measures and obey the rules as set by the organization.

19. Quality

The Senior Manager: Client Engagement and e-Communication and CIPC Call Centre Manager will subject the quality and standard of service rendered by resources to quality control.

Should CIPC be of the opinion that the quality of work is not to the required level, the service provider will be requested to provide another resource. The service provider will carry the cost related to these changes.

20. PRICING

REFER TO PRICING SCHEDULE AND COMPLETE ANNEXURE "A" PAGE 16 AND 17

THE FOLLOWING DOCUMENTS TO BE ATTACHED

1. SDB 3.3: PRICING SCHEDULE
2. SBD FORM 1: INVITATION TO BIDS
3. A BIDDER **MUST** ATTACH ***PRICE BREAKDOWN IN THE BIDDER'S COMPANY LETTERHEAD STATING UNIT COSTS AS WELL AS THE TOTAL BID PRICE INCLUSIVE OF ALL FOR THE DURATION OF THE CONTRACT***
4. BIDDERS TO COMPLY WITH ALL CONDITIONS STATED
5. The costing should be based on all requirements of the terms of reference for a period 4 months costs applicable. The onus is upon the prospective bidders to take into account all costs (including tenants installations) and to CLEARLY indicate the price. Cost breakdown must be provided, covering all required aspects in this tender. **NB The total price must be carried over to the pricing schedule and will be used to evaluate the bids. Prices must be firm for the duration of the project. FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY INVALIDATE THE BID.**

21. SPECIAL CONDITIONS

- I. The bidder must provide assurance/guarantee to the integrity and safe keeping of the information (that it will not amended/corrupted/distributed/permanently stored/copied by the service provider) for the duration of the contract and thereafter;
- II. **CIPC reserves the right to negotiate with the successful bidder on price;**
- III. Travel between the consultant's home, place of work to the "the dti" Campus (CIPC) will not be for the account of CIPC, including any other disbursements unless agreed to in writing by CIPC prior to the expense being incurred;
- IV. Government Procurement General Conditions of Contract (GCC) as issued by National Treasury will be applicable on all instances. The general conditions are available on the National Treasury website (www.treasury.gov.za);
- V. No advance payment will be made. Payment would be made in terms of the deliverables or other unless otherwise agreed upon by CIPC and the successful bidder. CIPC will pay within the prescribed period according to PFMA;
- VI. The price quoted by the prospective service provider must include Value Added Tax (VAT);
- VII. The successful bidder must at all times comply with CIPC's policies and procedures as well as maintain a high level of confidentiality of information.
- VIII. The successful bidder must ensure that the information provided by CIPC during the contract period is not transferred/copied/corrupted/amended in whole or in part by or on behalf of another party;
- IX. Further, the successful bidder may not keep the provided information by way of storing/copy/transferring of such information internally or to another party in whole or part relating to companies and/or close corporation;
- X. As such all information, documents, programs and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner and/or his/her delegate;
- XI. The service provider will therefore be required to sign a Declaration of Secrecy with CIPC. At the end of the contract period or termination of the contract, all information provided by CIPC will become the property of CIPC and the service provider may not keep any copy /store/reproduce/sell/distribute the whole or any part of the information provided by CIPC unless authorized in terms of the Declaration of Secrecy;
- XII. The Service Provider (successful bidder) will be required to sign a Service Level Agreement with CIPC prior to the commencement of the contract;
- XIII. Compliance with PFMA regulations in terms of the safeguarding of assets and adequate access control must be guaranteed. Assets include all infrastructure, software, documents, backup media and information that will be hosted at the Offsite ICT Recovery Site. These security measures must be specified in the SLA.
- XIV. As the commencement of this contract is of critical importance, it is imperative that the prospective Service Provider has resources that are available immediately. Failure to commence with this contract immediately from date of notification by CIPC could invalidate the prospective Service Provider's proposal.
- XV. The Service Provider shall be required to provide training & skills transfer for the services.
- XVI. Service Provider shall provide CIPC with all the license documentation that CIPC is entitled to as per the costing of the licenses.
- XVII. Bidders shall be subjected requested to demonstrate all claims made in the proposal.
- XVIII. The resources that a bidder supply will be subjected to an assessment result which will determine the suitability of the service provider
- XIX. to implement against the assignment of the ToR. Failure to provide suitable candidates will lead to cancellation of award of the tender.
- XX. CIPC reserves the right not to make this appointment.



22. EVALUATION PROCESS (Criteria)

The evaluation process will be done in accordance with the following criteria: Bids will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

Evaluation (Phases)

The evaluation will be completed in 3 phases:

- Phase 1: Compliance to minimum requirements and/or mandatory requirements
- Phase 2: Functional evaluation
- Phase 3: Pricing and Preferential Procurement policy.

10.1. PHASE 1: COMPLIANCE TO MINIMUM REQUIREMENTS AND MANDATORY REQUIREMENTS

During Phase 1 all bidders will be evaluated to ensure compliance to minimum document requirements. Without limiting the generality of the CIPC's other critical requirements for this Bid, bidder(s) **must submit the documents** listed in the **Table** below. All documents must be completed and signed by the duly authorized representative of the prospective bidder(s). During this phase Bidders' response will be evaluated based on compliance with the listed administration and mandatory bid requirements. All bidders that comply with the minimum requirements will advance to Phase 2.

Item No	Document that must be submitted	Compliance provide ANSWER: Yes /No	Non-submission may result in disqualification
1.	Invitation to Bid – SBD 1		Complete and sign the supplied pro forma document.
2.	Tax Status – SBD1		a) Bidders must submit Tax Clearance Certificate (TCC) PIN b) The TCS PIN will be used for the verification of tax compliance status a Bidder
3.	Declaration of Interest –SBD 4		Complete and sign the supplied pro forma document.
4.	Preference Point Claim Form – SBD 6.1		Non-submission will lead to a zero (0) score on BBEE
5.	Declaration of Bidder's Past Supply Chain Management Practices – SBD 8		Complete and sign the supplied pro forma document.
6.	Certificate of Independent Bid Determination – SBD 9		Complete and sign the supplied pro forma document.
7.	BIDDERS TO SUBMIT VALID AND COMPLIANT B-BBEE Certificate (Compulsory). THE DISQUALIFICATION DOES NOT APPLY TO NON- SOUTH AFRICAN BIDDERS		VALID AND COMPLIANT B-BBEE Certificate (Compulsory) FAILURE TO SUBMIT WILL IMMEDIATELY DISQUALIFY YOUR BID
8.	Registration on Central Supplier Database (CSD)		The Service Provider is encouraged to be registered as a service provider on the Central Supplier Database (CSD). Visit https://secure.csd.gov.za/ to obtain you. Vendor number. Submit PROOF of registration on the Central Supplier Database (CSD Report) SUBMIT SUPPLIER UNIQUE REFERENCE NUMBER
9	NB: Pricing Schedule: Compliance to ANNEXURE "A" REFER TO PAGE 5 TO 6 and 16 AND 17 <u>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</u>		• Submit full details of the Price Proposal in a separate SEALED envelope. • Price must be carried over to BOTH SBD 3.3 (Pricing Schedule) and SBD FORM1: (Invitation for Bids). <i>The Total Bid Amount will be used for the evaluation of bids therefore it must be inclusive of all costs for the duration of the contract)</i> <u>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</u>
10	IMPORTANT: SUBMISSION OF USB REFER TO PAGE 5 OF 18 BIDDERS TO READ AND UNDERSTAND THE CONDITIONS STATED IN PAGE 3 TO PAGE 6 OF THIS TOR <u>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</u>		1. Bidders must submit a USB with their proposal- 1 copy of the original document 2. USB to be submitted in pdf format and to be read only 3. All documents to be signed and bidders initial each page 4. Bidders must check that USB sticks open, are readable, and contain no blank pages, documents, or folders. Ensure that each folder created is numbered and avoid clustering folders with many documents rather create separate folders. Ensure that all folders and documents are opening prior submission 5. NOT password protected USBs allowed. Do not submit CDS 6. Bidders will be disqualified should the requirements mentioned on page 3 and 6 not complied with. <u>FAILURE TO COMPLY WITH ALL REQUIREMENTS SHALL IMMEDIATELY DISQUALIFY A BIDDER.</u>
11.	BIDDERS TO INDICATE IF THEY READ AND UNDERSTOOD THE CONDITIONS STATED IN PAGE 3 TO PAGE 6 OF THIS TOR		<u>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</u>

ALL BIDDERS THAT COMPLY WITH THE MINIMUM REQUIREMENTS WILL ADVANCE TO PHASE 2.

10.2. PHASE 2: FUNCTIONAL EVALUATION AND COMPLIANCE TO SPECIFICATION

All bidders that advance to Phase 2 will be evaluated by a panel to determine compliance to the functional requirements of the bid. The functional evaluation will be rated out of 100 points and will be determined as follows:

Cr. No	FUNCTIONALITY EVALUATION CRITERIA	RATING					WEIGHT	TOTAL SCORE
		1	2	3	4	5		
1	<u>DELIVERY OF SIMILAR ASSIGNMENTS AND EXPERIENCE</u> - Demonstrated experience executing similar projects. - Provide company testimonials / references from clients (client letterhead) that you have delivered this type of service (minimum of three testimonials/references). Please provide contact details of the clients. CIPC may verify reference provided by bidders - Include a table indicating similar contracts for the past 3 years indicating the following (client's company, project description, date awarded, date completed, contract amount) - Table indicating similar contracts Note: Experience should include the following: Call centre structure (Erlang C or similar); Wellness proposals and system recommendations. <u>Ratings to be awarded as follows:</u> Score = 1: Required reference letter/s not submitted or not displaying required experience and experience of less than 2 years Score = 2: Three reference letters submitted containing insufficient information, no satisfactory rating and experience between 2 and 3 years Score = 3: Three Reference letters meet the requirement of the project, satisfactory rating of 3, duration of project and completed in time: Experience more than 3 years – 6 years Score = 4: Three Reference letters meet the requirement of the project, satisfactory rating of 4 duration of project and completed in time; Experience more than 6 – 8 years. Score = 5: Three Reference letters meet the requirement of the project, satisfactory rating of 5, duration of project and completed in time; Experience greater than 8 years.						35	
2	<u>PROJECT PLAN</u> Detailed project plan with time frames and clearly defined milestones, correlating to the sections outlined in this document. A detailed explanation of the methodology, proposed solution and process to be adopted. <u>Ratings to be awarded as follows:</u> Score = 1: No approach, no methodology submitted, and no project plan submitted Score = 2: Project plan, approach and methodology partly or not meeting the above Score = 3: Approach, methodology and project plan demonstrating understanding Score = 4: Detailed approach, methodology and project plan with additional information exceeding the above criteria but without samples, template and project tools used in previous projects Score = 5: Detailed project plan with additional information exceeding above criteria with detailed samples, templates, project tools used in the past projects indicated.						40	
3	<u>CURRICULUM VITAE AND ACADEMIC QUALIFICATIONS</u> Qualified and experienced call/contact centre consultants. Please include CVs and certified qualifications of people / resources who will be responsible for the project. CIPC may verify references provided by bidders. <u>Ratings to be awarded as follows:</u> Score = 1: CVs not attached or indicate no required experience/knowledge of required project Score = 2: CVs with irrelevant experience, no similar work indicated for this project, Score = 3: CVs with relevant plus at least 3 years of similar work experience related to call/contact centre solutions Score = 4: CVs with relevant plus at least 4 years of similar work experience related to call/contact centre solutions Score = 5: CVs with relevant experience plus at least 5-8 years of similar work experience related to call/contact centre solutions *Note: Should the resource(s) not be available at the time that the tender is awarded, the successful bidder must ensure that the replacement resource(s) has/have the same level of knowledge, skills and experience as those reflected in the tender submission.						25	
	TOTAL						100	



Note:

1. Functionality will count out of 100 points. Bidders must achieve a minimum score of **60 points out of 100** on the functionality evaluation to proceed to the next phase.
2. Only Bidders who scored 60 or more points that will be evaluated for phase 3: **PRICING**
3. **BIDDERS THAT ACHIEVE LESS THAN 60 POINTS ON FUNCTIONALITY WILL BE DISQUALIFIED FOR FURTHER EVALUATION**

4. PHASE 4: PRICING AND PREFERENTIAL PROCUREMENT POLICY

Preferential Procurement Policy

The bidders that have successfully progressed will be evaluated in accordance with the **80/20** preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000) as amended together with Preferential Procurement Regulations, 2022

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:

The maximum points for this tender are allocated as follows:

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

2. 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. **Note: The CSD report will be used as the primary verification document for this bid. It is therefore compulsory to submit the CSD report**
3. 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

#	Specific goals allocated points	Means of verification and Required Evidence	Preference Points (80/20)
1	HDI, Race are black persons (ownership)* 100% black ownership = 10 points and based on percentage pro rata for black ownership less than 100% eg: 67% = 6.7 points	• B-BBEE Certificate • CSD Registration report • CIPC Company Registration Important the CSD will be used as our primary verification documents	10
2	Gender are women (ownership)* 100% or more women ownership = 8 points and based on percentage pro rata for black ownership less than 100% eg: 50% = 4.0 points	• B-BBEE Certificate • CSD Registration report • CIPC Company Registration Important the CSD will be used as our primary verification documents	8
3	Disability are disabled persons (ownership)* WHO disability guideline 100% ownership = 2 points and based on percentage pro rata for black ownership less than 100% eg: 50% = 1.0 points	• Confirmation of Disability Form as per SARS (ITRDD Form) • Medical Certificate Important the CSD will be used as our primary verification documents	2

Important: The CSD will be used as our primary verification document to claim points for specific goals for this bid

- It is compulsory to submit a CSD report for point verification
- 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
- Provide fixed price quotation for the duration of the contract
- Cost must be VAT inclusive and quoted in South African Rand
- Costing should be aligned with the project activities / project phases

The bidder with the highest score will be recommended as the successful service provider.

23. ANNEXURE (“A”): BID PRICING SCHEDULE

TO BE INCLUDED IN THE PRICE FOLDER AS WELL AS IN THE SEALED PRICE ENVELOP TOGETHER WITH ALL OTHER PRICE DOCUMENTS AS LISTED BELOW

No	PRICING INSTRUCTIONS: BIDDERS TO COMPLY WITH ALL REQUIREMENTS
1.	<u>Applicable Currency:</u> All prices shall be quoted in South African Rand.
2.	<u>Completion of Pricing Schedule:</u> - Bidders shall complete the pricing schedule in full, inserting all the information required therein. - In addition to the pricing schedule in this bid document, bidders may prepare a more detailed pricing schedule should they wish to do so, and include this in their pricing proposal, provided that such additional pricing schedule is in line with the deliverables on the CIPC issued pricing schedule.
3.	<u>Applicability of Quoted Prices:</u> - All quoted prices must remain firm for the duration of the contract, unless stipulated otherwise in the special conditions of contract. - The condition must be stated in SBD3.3 as well
4.	<u>Total Bid Cost:</u> - Prices quoted must include all applicable taxes including VAT, less all unconditional discounts, plus all costs to deliver the services and/or goods. - Note: Service providers will be responsible for all costs e.g., transportation for ALL activities associated with this bid. It is therefore the bidder's responsibility to ensure that all costs are included in the price proposal submitted to CIPC
5.	<u>Exchange Rate Fluctuations:</u> - Where imported goods or services are to be used, and pricing is subject to exchange rate fluctuations, the applicable foreign currency must be stipulated, as well as the <i>exchange rate at the time of bidding</i>. - The portion of the bid price subject to exchange rate fluctuations must be stated <u>in the pricing schedule- SBD 3.3</u>
6.	<u>Bid Price Calculation:</u> Bidders to not that estimates of quantities are provided to allow for the calculation of a bid price that allows equal comparison between bidders.
7.	<u>Applicable SBD Document to be included in the USB as well as sealed Pricing envelop</u> - THIS PRICING SCHEDULE (ANNEXURE H (“A”)) - SDB 3.3: PRICING SCHEDULE - SBD FORM 1: INVITATION TO BIDS FOR - A BIDDER <u>MUST</u> ATTACH PRICE BREAKDOWN IN THE BIDDER'S COMPANY LETTERHEAD SIGNED BY AUTHORISED REPRESENTATIVE

FAILURE TO COMPLY WITH ALL THE ABOVE REQUIREMENTS FOR PRICING SHALL IMMEDIATELY INVALIDATE THE BID



TABLE 1: (FORMAT FOR PRICE QUOTATION):

Item Number	Item Description	Monthly Amount (VAT inclusive)	TOTAL
1.	Staffing and Structural Assessment	R a member of the dtic group	R
2.	Capacity and Capability Report	R	R
3	Process Re-engineering Report	R	R
4	Call Centre Policy	R	R
5	Transition Plan to Contact Centre	R	R
6	Training, Coaching, and Quality Assurance Framework:	R	R
7	Updated SOPs and KPIs	R	R
8	Technology report:	R	R
9	Final Report	R	R
10	Presentation to key executives	R	R
11	Any other relevant cost please specify Please provide full details of the item	R	R

TOTAL COST FOR A PERIOD OF 4 MONTHS

	Total	
<u>Total Bid Cost over 4 MONTHS = (GRAND TOTAL OF TABLES) inclusive of all costs for this bid</u> Ceiling price to be carried over to SBD 3.3 and form 1 for the duration of the contract. This total will be used for price evaluation	Price VAT excl.	
	VAT	
	TOTAL	

FAILURE TO COMPLY WITH ALL THE ABOVE REQUIREMENTS FOR PRICING SHALL IMMEDIATELY INVALIDATE THE BID.

24. BRIEFING SESSION

THERE IS NO BRIEFING SESSION SCHEDULED FOR THIS.

BRIEFING SESSION/SITE VISITS	NONE

25. SUBMISSION OF PROPOSALS

Sealed proposals will be received at the Tender Box at the Reception, 77 Mentjies Street, Sunnyside, **the DTI** campus, Block F.

Proposals should be addressed to:

Manager (Supply Chain Management)

Companies and Intellectual Property Registration Office

Block F, **the dtic** Campus, 77 Meintjies Street,

Sunnyside, PRETORIA

26. ENQUIRIES

A. Supply Chain Enquiries

Ms Ntombi Maqhula OR Mr Solomon Motshweni

Contact No: (012) 394 3971 /45344

E-mail: Nmaqhula@cipc.co.za OR SMotshweni@cipc.co.za

B. Technical Enquiries

Ms Magda Swemmer– Email: mswemmer@cipc.co.za

Note : It is the bidder's responsibility to call CIPC if they have any questions that have not been answered via email, as the system may have flagged their email as spam.

27. DEADLINE FOR SUBMISSION

BIDS OPENING DATE: 22 APRIL 2025

COMPULSORY SITE VISIT: NONE

BIDS CLOSING TIME: 11:00AM

BIDS CLOSING DATE: 27 MAY 2025

BIDDERS MUST ENSURE THAT BIDS ARE DELIVERED IN TIME TO THE CORRECT ADDRESS. LATE PROPOSALS WILL NOT BE ACCEPTED FOR CONSIDERATION

NB: IT IS THE PROSPECTIVE BIDDERS' RESPONSIBILITY TO OBTAIN BID DOCUMENTS IN TIME SO AS TO ENSURE THAT RESPONSES REACH CIPC, TIMEOUSLY. CIPC SHALL NOT BE HELD RESPONSIBLE FOR DELAYS IN THE POSTAL SERVICES AND BID DEPOSITED IN THE INCORRECT BID BOX