

# ANNEXURE: "H"



Companies and Intellectual  
Property Commission  
a member of the dtic group

## TERMS OF REFERENCE ("TOR")

**CIPC BID NUMBER: 11-2025-2026**

**DESCRIPTION: INVITATION TO BIDDERS TO SUBMIT PROPOSALS FOR A CLOUD BASED CALL CENTRE SOLUTION AND AN END-TO-END CLOUD TELEPHONY SOLUTION**

**CONTRACT PERIOD: (60 MONTHS) 5 YEARS WITH AN OPTION TO RENEW ANOTHER 5 YEARS**

**BID CLOSING DATE: 20 MARCH 2026**

**COMPULSORY BRIEFING SESSION: 06 MARCH 2026**

**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" SITUATED AT THE DTIC MAIN GATE**

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CIPC Companies and Intellectual  
Property Commission

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## 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 DTIC (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. No advance payment(s) will be made. CIPC will pay within the prescribed period as per the PFMA.
- 14. All prices quoted must be inclusive of Value Added Tax (VAT)**
- 15. All prices must be quoted in South African Rand**
- 16. All prices must be valid for 120 days**
17. 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.
18. 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.
19. 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.
20. 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.

21. 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.
22. 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.
23. CIPC will enter into Service Level Agreement with the successful Service Provider.
- 24. CIPC reserves the right not to award this bid to any prospective bidder or to split the award.**

**25. 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.
26. The successful bidder, which includes active company directors and resources assigned/deployed to the project, will undergo a security screening process. The appointment is contingent upon the positive results of this security screening. **If any serious negative information arises during this process, the CIPC reserves the right to request the bidder to remedy the situation within a specified period, and/or if not possible, the CIPC may withdraw the award.**
27. Occupational Health and Safety Obligations
- i. CIPC is committed to ensure a safe work environment, imposing protection towards the health and safety of all personnel and preventing workplace injuries or losses. Mandataries/ service providers are employers, with duties prescribed in the Occupational Health and Safety Act No. 85 of 1993 as amended and other legislative obligations. Mandataries/ service providers shall strictly adhere to and ensure that their personnel adhere to the provisions of the OHS Act 85 of 1993 inclusive of required OHS obligations (CIPC OHS requirements and all other applicable legislation). The awarded service provider is required to provide assurance by submitting the necessary and/or obligated Occupational Health and Safety requirements to CIPC.
- ii. The necessary and/or obligated Occupational Health and Safety requirements include:
- Bidding Companies valid COIDA Letter of Good Standing, or a licensed compensation insurer.
  - Bidding Companies signed Health; Safety & Environmental Policy Signed by Bidder's CEO OHS Act Section 16(1).
  - The Acceptance of Occupational Health and Safety Legislative Obligations and Other Requirements. Upon Award, the following OHS Obligations shall be applicable but are not limited to:
    - The Occupational Health and Safety Act 85 of 1993 Section 37(2) Agreement
    - Other Occupational Health & Safety requirements (OHS file) compliance specific to the scope.

1. **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 each and every page of the proposal shall contain the initials of same signatories
- 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) **Important:** The USB will be used for evaluation purposes up to tender award, so all documents must be included in the USB, including SBD forms, technical proposal mandatory documents etc.
- i) The **USB** must contain the **exact** documents/ information submitted in the original copy which is only for record keeping
- j) 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 opens, 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*
- k) **THE USB WILL BE USED FOR EVALUATION HENCE THE BIDDER IS REQUIRED TO ENSURE THAT THE USB CONTAINS ALL INFORMATION.**
- l) **CIPC WILL NOT BE HELD LIABLE FOR INCOMPLETE PROPOSALS/ INFORMATION SUBMITTED IN THE USB'S**
- m) All pages must be signed, numbered and initial as per the original copy
- n) The USB must be submitted in **PDF format ONLY** and must be **read ONLY, NO Passwords Protection**
- o) **BIDDERS TO ENSURE THAT USB'S ARE WORKING PRIOR SUBMISSION**
- p) **Bidders to ensure that USB 's are not password protected**
- q) **IT IS THE BIDDER'S RESPONSIBILITY TO VERIFY IF THE USB IS WORKING BEFORE SUBMISSION**
- r) **BIDDER'S 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.**

## **2. 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 FROM PAGE 27**
- 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 21 of 29 of the Terms of reference under Mandatory Requirements**

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

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.**

### 3. INTRODUCTION

The Companies and Intellectual Property Commission (CIPC), herewith referred to as 'the CIPC' is an organ of state whose mandate is:

- Registration of Companies, Co-operatives and Intellectual Property Rights and maintenance thereof;
- Disclosure of Information on its register;
- Promotion of education and awareness of Company and Intellectual Property Law;
- Promotion of compliance with relevant legislation;
- Efficient and effective enforcement of relevant legislation;
- Monitoring compliance with and contraventions of financial reporting standards, and making recommendations thereto to Financial Reporting Standards Council (FRSC);
- Supervision of Collecting Societies in sound recordings
- Taxation of legal costs in Patent matters
- Licensing of Business rescue practitioners.
- Oversight role of Independent Review professional bodies.
- Report, research and advise Minister on matters of national policy relating to company and intellectual property law..

### 4. BACKGROUND

CIPC came into existence in May 2011 after being established by the Companies Act, 2008 (Act 71 of 2008), herein after referred to as the Companies Act, as a juristic person to function as an organ of state within the public administration, but as an institution outside the public service.

### 5. PURPOSE

Customer service is very important to the Companies and Intellectual Property Commission (CIPC). To ensure exceptional customer service, the necessary call centre tools, systems and integration are required to help achieve CIPC's goals. In addition, CIPC requires an end-to-end cloud telephony system for its Head Office and CIPC Branches.

The purpose of this document is to indicate the user requirements for a Cloud Based CIPC Call Centre solution as well as a complete cloud-based telephony solution for all employees and/or contractors within CIPC. The system must function irrespective of device or locality of an assigned individual.

### 6. SCOPE OF WORK

What CIPC requires;

**NB: Part of the listed scope below will apply to the Call Centre and/or the rest of the organisation including its current and future branches.**

## PHASE 1

### .1 A Cloud-based Call centre solution

The CIPC requires a cloud-based call centre system for its call centre. It should enable staff to commute and work either from the office or from home. In addition, this solution must cater for all employees' even those that are not part of the Call centre but must be able to receive and make calls at any location and at any time.

### .2 Inbound call handling

- The current telephone number in use is **086 100 2472**. The Service provider must advise how the number can be ported (non negotiable).
- Current international call centre number 087 743 7000 to be replaced with **(+2712) XXX XXX** All telephony numbers 087 xxx xxxx must be replaced with **(+2712) XXX XXX (non-negotiable) – CIPC currently struggling with 087 numbers being treated as spam.**
- Calls to be automatically routed to certain agents according to skillsets. A skill-based routing option is required where certain staff members respond to certain skillsets, and it must be possible to set priorities (e.g. some agents will receive the calls as P1), and if there is an overflow, it must go to a second group of CC agents.

### .3 Call back functionality

The system must provide customers with an option to leave their details and request a call back from the call centre team. The system should securely capture the customer's number, manage callback queues, and connect the customer to the next available agent while providing status tracking and reporting.

### .4 Interactive Voice Recording (IVR) (exclusive to Call centre)

- Must be easy to manage IVR routing options.
- IVR to make provision for self-help by customer. CIPC receives a high volume of "How to" enquiries and there must be a self-help option where customers can provide their SMS number to receive an SMS with a link with the step-by-step guides. CIPC will provide the SMS gateway for sending SMS messages.
- The Service Provider must configure the voice announcements when implementing the system. Set-up must be done according to CIPC needs.
- The system must have an emergency skillset feature. Closing and opening of the call centre on an ad hoc basis when emergencies occur.

### .5 Reporting

#### Reporting and Analytics

The proposed solution must provide comprehensive operational, historical, and real-time reporting capabilities for call centre and telephony operations.

The Service Provider must ensure that all reporting data generated by the solution is accessible to CIPC for enterprise reporting and analytics purposes.

CIPC currently utilises Microsoft Power BI as its enterprise reporting and visualisation platform. The proposed solution **must integrate natively with Power BI** to enable CIPC to:

- Build, customise, and manage its own reports and dashboards;
- Combine call centre and telephony data with data from other CIPC systems;
- Perform advanced analytics without reliance on the Service Provider.

The Service Provider must provide secure access to the underlying reporting datasets through supported integration mechanisms, including but not limited to APIs, database views, or data exports, to enable Power BI connectivity.

Reports must include, but not be limited to:

- Agent performance and productivity;
- Service levels and call volumes;
- Call outcomes and dispositions;
- Queue performance and skillset utilisation;
- Real-time and historical operational statistics.

Reporting data must be retained and accessible for a minimum period of twelve (12) months online, with older data archived in accordance with CIPC's data retention policies.

- **Examples of historic reports, as well as print screens of wallboards/dashboards and real time reports to be provided as part of the bid documents.**

#### **.6 Call queue management system (exclusive to Call centre)**

- Call centre system to provide users, queues and skillset management tool that can be managed by CIPC.
- Remote monitoring of calls (accessible from mobile devices, publicly exposed for authenticated users).
- Dashboards/s to display real time reports according to requirements for all applicable employees (Pay per use)

#### **.7 Call Recordings (exclusive to Call centre)**

- All calls need to be recorded and stored in a database and this database must be backed up daily.
- Call centre management must be able to retrieve the required call recording based on different search criteria like call reference (ticket) number, date, time of call, number from which call was received, agent name etc.
- Call recordings must be easily accessible and searchable
- Information like name or Ext: no of agent, duration of call, skillset etc, need to be displayed when calls are selected for quality control.
- It must be possible to export and email the recordings.
- All records should be kept according to data retention policy (5 years)

- Screen recordings should be included so that the call centre agents' actions can be clearly seen while they move between different screens during a call.
- The proposed solution must integrate with CIPC current Customer Enquiries Management System (CEMS) which will generate a call reference (ticket) number which must also be saved on the proposed solution, linking both the service provider solution and the CEMS solution. After term end, all data exports from the service providers database to be imported into an Oracle database.

## .8 Quality Management

### Quality assurance/CC management – the system must allow the following:

- Listen to agents' recordings and customer interactions for training purposes and to ensure quality standards are met.
- Silence, barge and whisper functionality
- Rate agent interactions
- Ability to provide call quality scorings using the system
- Export of scoring reports and ability to email the reports to agents
- System reports to have ability to indicate if call was dropped by agent or by customer

## .9 Speech Analytics

### a. Speech Analytics and Text-to-Speech Capabilities

The proposed solution must include speech analytics capabilities that convert voice interactions into structured text data for analysis.

- The speech analytics functionality must support:
  - Detection of customer call reasons and root causes;
  - Sentiment and intent analysis;
  - Keyword and phrase detection configurable by CIPC;
  - Identification of emerging trends, repeat issues, and call drivers.
- The solution must provide both real-time and post-call analytics, including alerts for escalation risks, negative sentiment, or compliance issues.
- Outputs generated by speech analytics, including transcriptions, sentiment scores, keywords, and summaries, must be stored as structured data and made accessible to CIPC via APIs or data exports for enterprise analytics and Customer 360 enrichment.

## Customer Call Reason & Root Cause Analysis

- Detection of underlying and repeat call drivers
- **Text-to-Speech Capabilities**
- **Real-Time and Post-Call Insights**
  - Real-time spoken alerts for escalation risks, negative sentiment, or compliance issues
  - Automated spoken summaries of individual calls and agent performance
- **Sentiment, Intent, and Keyword Detection**
  - Sentiment and intent analysis
  - Keyword and phrase detection configurable by business rules
- **Reporting and Trend Analysis**

Spoken trend summaries highlighting:

  - Top reasons customers contact the call centre
  - Emerging issues and call spikes

## .10 **Real-Time Data**

### **Real-Time and Near Real-Time Data Availability**

The proposed solution must support near real-time availability of operational data to enable live dashboards, monitoring, and alerting.

Data latency for operational reporting should not exceed five (5) minutes from the time of occurrence.

The Service Provider must describe the mechanisms used to enable real-time or near real-time data delivery as part of the technical proposal.

## .11 **Quality of voice calls**

- Service provider must ensure that the voice quality is up to standard (No call cuttings / dropped calls etc.)
- Bidder must advise on minimum line speed or bandwidth required to run the solution or provide quality voice service

## .12 **Omnichannel Integration**(exclusive to Call centre)

### **Omnichannel and Customer 360 Integration**

The proposed solution must integrate seamlessly with CIPC's internal systems, including the Customer 360 module and the customer ticketing system, through secure Application Programming Interfaces (APIs).

The solution must enable the real-time exchange of customer interaction data, including but not limited to:

- Customer identifiers;
- Calling telephone numbers;
- Call reference and ticket numbers;
- Interaction timestamps and channels;
- Call outcomes and dispositions.

Upon receipt of a customer call, the solution must retrieve and display the relevant customer profile and associated ticket or reference number to the agent.

All customer interactions across supported channels must be routed, recorded, reported, and linked to the Customer 360 view to ensure a single, consolidated view of customer engagements.

The solution must support both inbound and outbound interaction data synchronisation without degrading performance, reliability, or security.

### **.13 Integration**

#### **API and Systems Integration Requirements**

- The proposed solution must expose secure, standards-based APIs to support integration with existing and future CIPC systems.
- **The APIs must, at a minimum, support:**
  - RESTful interfaces using structured data formats (e.g. JSON);
  - Secure authentication and authorisation mechanisms;
  - Event-driven notifications or webhooks for key call lifecycle events, including call initiation, call termination, agent assignment, and call disposition.
- The solution must support both inbound and outbound data integration and must allow CIPC to retrieve operational, analytical, and metadata without dependency on proprietary tools or vendor intervention.
- All APIs must be documented, versioned, and made available to CIPC as part of the solution documentation.

### **.14 After call surveys**

- After-call surveys must be easy to set up, draw reports from and to upload revised surveys.
- The system must have a reporting functionality. E.g. Individual reports per call centre agent and reports per month on call centre performance to be drawn.
- E-mail as well as telephonic surveys. Email address on client profile which will be displayed to be used for email surveys

#### .15 **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 and strong physical security

#### .16 **Up-time guarantee**

- There should be an uptime guarantee of minimum of 95%.

#### .17 **Licenses**

- Quotation should be based on **100** licenses for Call centre (Pay per use) inclusive of systems management licenses and 700 licenses for the other employees and/or contractors (Pay per use); Quotation must include the maximum required license, however CIPC will only pay for licenses utilized.
- Scalability must be allowed based on capacity and the need. i.e. pay per usage.
- A pricing schedule needs to be provided – refer Annexure A

#### .18 **Distributed software layer**

- The solution should provide a distributed software layer so that CIPC does not have to negotiate contracts with carriers, set up networking interconnections, or build algorithms for routing, monitoring, and failover.

#### .19 **Installation and configuration of the system**

- Service provider to install and configure system as per call centre requirements as well as the expanded cloud telephony system for the rest of the organisations.. The system should be hosted by the service provider and the services provided to CIPC via the cloud.
- The system must be site agnostic (i.e. any site, or work from home).
- The monitoring application should be accessible via different end-user devices (computer, mobile phones, tablets and any end-user access tool)
- The system should be highly available, cost effective and hosted and managed by the service provider.

#### .20 **Support**

- Telephonic support should be provided by the service provider (throughout the contract duration) during office hours

(07:00 – 17:00 weekdays).

- On-site calls as and when requested – 200 hours per year. CIPC should not be charged extra for transport to CIPC offices. (Should there be a cost associated with travel, it must be included in the quotation.
- Support and Maintenance for a 5-year period or a further 5 year period if the contract is renewed.
- IVR support – and provision for bi-annually of IVR messages. Service provider to assist with configuration of such. (It must be included on the quote if required, billing to take place. If not required, no billing
- 

#### **.21 Training**

- Technical training for CIPC ICT support staff members. (ICT staff training 3 virtual training sessions)
- Training must include user training relating to the telephony system (). Six virtual MS Teams.
- In-depth call centre management training (including standard and customized reports) for up to ten staff members – Call Centre Management.
- Call centre staff training 50 CC agents on CC System (4 virtual MS Teams sessions)
- Manuals to be provided relating to system, as well as reports.

#### **.22 Integration**

- Service provider to assess the current CIPC bandwidth and advise on suitable changes.
- The proposed system should interface with the CIPC systems via Application Programmes Interface (APIs)
- The system should be able to integrate seamlessly with existing solutions via APIs provided by CIPC, without sacrificing performance, reliability or security.
- The current DB's (Oracle, Informix and SQL) – these information stores will form the basis of feeding client information and transactional data to the proposed cloud telephony solution.
- Solution scalability to ICT infrastructure security needs
- Solution must be able to integrate with the database for retrieval of customer profiles.

#### **.23 ICT Infrastructure**

- The CIPC requires detailed technical and architectural documentation with a diagram clearly indicating the required CIPC infrastructure equipment. Requirements to be indicated to enable CIPC ICT to cater for the solution.
- Service provider must provide a diagram of the interconnectivity between CIPC, its current branches, and the service provider.
- The service provider must advise how much bandwidth to provide, CIPC will provide the bandwidth to meet this requirement.
- The solution must be compatible with both MPLS and SDWAN for connectivity.

#### **.24 Project Management**

- Service provider should include costs for a project management service.
- The resource will report to the CIPC PMO office.

#### **.25 Documents and Handover**

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

#### **.26 DATA STORED ON CLOUD PLATFORM**

- Data must be stored within the borders of South Africa. All recordings to be stored for the 5 year period.

#### **Data Ownership and Enterprise Analytics Integration**

- All data generated, processed, or stored by the proposed solution, including call records, recordings metadata, interaction logs, speech analytics outputs, and performance metrics, shall remain the sole property of CIPC.
- The Service Provider must enable ongoing access to operational and analytical data throughout the contract duration to support CIPC's enterprise analytics and Customer 360 initiatives.
- The solution must support the extraction of data into CIPC's enterprise data platform, including data lakehouse environments, through secure and scalable mechanisms such as APIs, scheduled exports, or event-based integration.
- Data must be provided in open, industry-standard formats suitable for analytical processing and long-term storage.
- CIPC must not be restricted to accessing data only at contract termination, and no additional licensing or professional services costs may be imposed for data access or extraction.

#### **.27 Data Portability and Exit Management**

- The Service Provider must ensure full data portability throughout the contract duration and upon contract termination.
- CIPC must be able to extract all data, including historical and archived data, at any time during the contract without restriction.
- Upon termination or expiry of the contract, the Service Provider must provide a complete data extract in an agreed format suitable for import into CIPC systems, including Oracle-based environments, without additional cost.
- The Service Provider must not impose technical, contractual, or commercial barriers that prevent CIPC from transitioning to an alternative solution.

## 28. CONTRACT DURATION

5 years with an option to renew for a further five years.

## 29. BID COSTING

REFER AND COMPLETE ANNEXURE "A" PAGE 23 &24

THE FOLLOWING DOCUMENTS TO BE ATTACHED

1. SDB 3.3: PRICING SCHEDULE
2. SDB 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 BELOW AS WELL AS THOSE ON PAGE 5 WITH REGARDS TO PRICE  
The costing should be based on all requirements of the terms of reference. The onus is upon the prospective bidders to take into account all costs 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. PRICE CARRIED OVER TO SDB FORM 3.3 AND SDB FORM 1 MUST INCLUDE ALL COSTS FOR THE DURATION OF ALL PERIOD STATED ABOVE UNDER PRICING. FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY INVALIDATE THE BID.**

Note: Service providers will be responsible for all costs e.g. transportation for ALL activities associated with this bid.

### **30. 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. The Service Provider must ensure that their work is confined to the scope as defined and agreed.
- IV. Travel between the consultant's home, place of work to 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.
- V. 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](http://www.treasury.gov.za));
- VI. 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.
- VII. The price quoted by the prospective service provider must include Value Added Tax (VAT).
- VIII. 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.
- IX. 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.
- X. 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.
- XI. 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.
- XII. 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.
- XIII. The Service Provider (successful bidder) will be required to sign a Service Level Agreement with CIPC prior to the commencement of the contract; and
- XIV. 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.
- XV. 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.

- XVI. The Service Provider shall be required to provide training & skills transfer for the services as per paragraph 3 of this document.
- XVII. Service Provider shall provide CIPC with all the license documentation that CIPC is entitled to as per the costing of the licenses.
- XVIII. The Service Provider shall be required to provide training & skills transfer for the services as per paragraph 3 of this document.
- XIX. Bidders shall be subjected requested to demonstrate all claims made in the proposal.
- XX. The resources that a bidder supply will be subjected to an assessment result which will determine the suitability of the service provider to implement against the assignment of the ToR. Failure to provide suitable candidates will lead to cancellation of award of the tender.
- XXI. CIPC reserves the right not to make this appointment
- XXII. The service provider will sign a confidentiality agreement regarding the protection of CIPC information that is not in the public domain.
- XXIII. Appointment will be subject to positive security screening results by the State Security Agency.
- XXIV. All possible steps shall be taken by the contract to ensure full execution of this agreement.
- XXV. CIPC reserves the right not to make this appointment

### 31. **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

Phase 2: Functional Evaluation

Phase 3: Pricing and preferential procurement policy

#### **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.

**BIDDERS TO COMPLETE THE TABLE BELOW**

| 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  |                                    | Bidders must submit <b>Tax Clearance Certificate (TCC) PIN</b><br><b>The TCS PIN</b> 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.      | Declaration of Bidder's Past Supply Chain Management Practices – SBD 8   |                                    | Complete and sign the supplied pro forma document.   |
| 5.      | Certificate of Independent Bid Determination – SBD 9   |                                    | Complete and sign the supplied pro forma document.   |
| 6.      | Completion in full of the Request for Proposal documents   |                                    | Bidder to complete and sign documents  |
| 6.      | <b>BIDDERS TO SUBMIT VALID AND COMPLIANT B-BBEE Certificate (Compulsory). Latest valid BBBEE certificate- SANAS Accredited or sworn affidavit for EME/QSE signed by the deponent and the Commissioner of Oath</b><br><b>FAILURE TO SUBMIT WILL IMMEDIATELY DISQUALIFY YOUR BID. THIS DISQUALIFICATION DOES NOT APPLY TO NON- SOUTH AFRICAN BIDDERS</b>   |                                    | <b>VALID AND COMPLIANT B-BBEE Certificate (Compulsory)</b><br><br><b>FAILURE TO SUBMIT WILL IMMEDIATELY DISQUALIFY YOUR BID</b>  |
| 7.      | Registration on Central Supplier Database (CSD) <b>Compulsory</b><br>Note: <b>Important: Bidders to submit valid and compliant B-BBEE Certificate as well as the CSD report. The BBBEE certificate- SANAS Accredited or sworn affidavit for EME/QSE is the primary verification document to claim points for specific goals for this bid. Failure to submit a compliant B-BBEE certificate will result in disqualification.</b>  |                                    | The Service Provider is encouraged to be registered as a service provider on the Central Supplier Database (CSD). Visit <a href="https://secure.csd.gov.za/">https://secure.csd.gov.za/</a> to obtain your. Vendor number. Submit PROOF of registration on the Central Supplier Database (CSD Report)<br><br><b>SUBMIT SUPPLIER UNIQUE REFERENCE NUMBER</b>  |
| 8.      | NB: Pricing Schedule:<br>Compliance to <a href="#">PAGE 20 AND 21- ANNEXURE "A"</a><br>REFER TO PAGE 4 TO 5 and 23 & 24<br><b>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</b>   |                                    | Submit full details of the Price Proposal in a separate <b>SEALED</b> envelope.<br>Price must be carried over to <b>BOTH SBD 3.3 (Pricing Schedule) and SBD FORM1:</b> (Invitation for Bids). <i>The Total Bid Amount (CEILING AMOUNT) will be used for the evaluation of bids therefore it must be inclusive of all costs for the duration of the contract)</i><br><b>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</b>  |
| 9.      | <b>IMPORTANT: SUBMISSION OF USB</b><br><br>REFER TO PAGE 5<br><br>BIDDERS TO READ AND UNDERSTAND THE CONDITIONS STATED IN PAGE 3 TO PAGE 5 OF THIS TOR<br><br><b>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</b>  |                                    | Bidders must submit a USB with their proposal- 1 copy of the original document<br>USB to be submitted in pdf format and to be read only<br>All documents to be signed and bidders initial each page<br><b>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.</b><br>No password protected USB allowed. Do not submit CDS<br>Bidders will be disqualified should the requirements mentioned on page 3 and 6 not complied with.<br><i>Important:</i> The USB will be used for evaluation purposes up to tender award, so all documents must be included in the USB, including SBD forms, technical proposal mandatory documents etc..<br><br><b>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</b> |
| 10.     | <b>Note:</b> All prospective bidders will be expected to attend a mandatory briefing session/site visit as determined by the CIPC where questions will be addressed by a panel of the CIPC.  |                                    | <b>FAILURE TO ATTEND THE COMPULSORY BRIEFING SESSION WILL RENDER YOUR BID BEING DISQUALIFIED</b>   |
| 11.     | <b>Mandatory Requirement: OEM Certificates/Partnership letters for the proposed solution. (bidders to submit relevant accreditation certificate/letter) –</b><br>The bidders must provide a letter from Solution Vendor Original Equipment Manufacturer (OEM) which indicates that they are accredited for product/Solution/Systems/Technology manufacturer /owner authorising the resale or support of the proposed Product/Solution/System/Technology.<br>In the event that the bidder is the owner of the proposed Product/Solution/Systems/Technology, a letter must be attached for confirmation. |                                    | <b>The letter or a testimonial or certification must be submitted in order to proceed to the next phase</b> (phase 2). Bidders to ensure that a letter/ testimonial /certification etc. addressing this requirement is attached.<br>All bidders are required to comply with this requirement.<br><b>Should there be no letter/ testimonial /certification etc attached the bid will immediately be disqualified.</b><br>The letter/ testimonial /certification must be signed dated by authorized representative<br>It should state expiry date or validity<br><b>FAILURE TO SUBMIT WILL RENDER YOUR BID BEING DISQUALIFIED</b>  |
| 12.     | BIDDERS TO INDICATE IF THEY READ AND UNDERSTOOD THE CONDITIONS STATED IN PAGE 3 TO PAGE 5 OF THIS TOR  |                                    | <b>FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY DISQUALIFY A BIDDER.</b>  |

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

**IMPORTANT:** The following documents need to be submitted as part of the proposal and will be used during the evaluation.

A: Experience of company (Testimonials need to be provided)

B: Resources (CVs of staff who will assist with this project) Kindly take note of the criteria on which the scoring is based.

C: Project plan with timelines

D: Technical Requirements / Proposal. NB: *Bidders must respond systematically, and address separately and clearly marked all requirements, indicate understanding, approach, methodology, technology, systems etc. to be used as per TOR from point 3.1 to point 3.26.*

- a) Include architectural diagram
- b) OEM certificates
- c) Print screens of reports and wallboard/dashboard
- d) *The functional evaluation will be rated out of 100 points and will be determined as follows:*

| No | Evaluation Criteria  | Rating |   |   |   |   | Weight | Total |
|----|--|--------|---|---|---|---|--------|-------|
|    |  | 1      | 2 | 3 | 4 | 5 | %      |       |
| 1. | <p><b>Experience of company</b></p> <p>Bidder must have <b>relevant experience</b> in the implementation of a Call centre as well as an end-to-end telephony solution whereby at least one must be a <b>cloud based implemented solution</b></p> <p><b>Provide at least three references letters, not older than 8 years,</b> with contactable references (on clients' letterhead) relating to Call centre and end-to end telephony implementation, indicating relevant experience (Preferably cloud based solutions).</p> <p><b>Note:</b> At least one of the implementations must be active, with the ability for CIPC to conduct site visits if deemed necessary.</p> <p><u>Ratings to be awarded as follows:</u></p> <p>1. <b>Score = 1:</b> No letters submitted</p> <p>2. <b>Score = 2:</b> Experience less than 3 years of cloud-based call centre and end-to-end telephony solution implemented</p> <p>3. <b>Score = 3:</b> Experience of 3 years, but less than 5 years cloud-based call centre and end-to-end telephony solution implemented</p> <p>4. <b>Score =4:</b> Experience 5 years, but less than 8 years cloud-based call centre and end-to-end telephony solution implemented</p> <p>5. <b>Score = 5:</b> Experience 8 years and above of cloud-based call centres and end-to-end telephony implemented.</p> |        |   |   |   |   | 20     |       |

| No | Evaluation Criteria   | Rating |   |   |   |   | Weight<br>% | Total |
|----|---|--------|---|---|---|---|-------------|-------|
|    |   | 1      | 2 | 3 | 4 | 5 |             |       |
| 2. | <p><b>RESOURCES</b></p> <ul style="list-style-type: none"> <li>Provide at least <b>three (3) CV/s</b> of key resources, with experience in roll out and maintaining a cloud call centre and end-to-end telephony solution (indicate seniority e.g. project leader etc) that will be assigned to the project, clearly indicating relevant ICT and proposed solution/technology expertise.</li> <li>Evaluation of the CV/s will be based on the experience relevant to the scope of work and not necessarily on the amount/number of CVs provided.</li> <li><b>(CVs indicating experience of staff in rolling out and maintaining a cloud call centre and end-to-end telephony solution)</b></li> <li><b>All resources must have at least 3 years' experience</b></li> </ul> <p><b>CIPC <u>may</u> verify references provided by bidders</b></p> <p><b><u>Ratings to be awarded as follows:</u></b></p> <ol style="list-style-type: none"> <li><b>Score 1</b> = <i>inadequate, inappropriate experience less than 1 year.</i></li> <li><b>Score 2</b> = <i>One year but less than 3 yrs. relevant experience,</i></li> <li><b>Score 3</b> = <i>3 yrs. relevant experience</i></li> <li><b>Score 4</b> = <i>4 -5 yrs. relevant experience or</i></li> <li><b>Score 5</b> = <i>6 - 8 yrs. relevant experience</i></li> </ol> <p><b>*Note:</b> 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.</p> |        |   |   |   |   | 10          |       |
| 3  | <p><b>RESOURCES ACCREDITATION</b></p> <ul style="list-style-type: none"> <li>Provide <b>three (3) CV/s</b> of key resources, with accreditation/certification from OEM in the roll out and maintaining a cloud call centre and end-to-end telephony solution. Minimum 3 years OEM certification or accreditation linked to the proposed solution. Accredited/Certification of the resources is a requirement <b>(CVs indicating certification/accreditation of staff in rolling out</b></li> </ul>  |        |   |   |   |   | 10          |       |

| No | Evaluation Criteria  | Rating |   |   |   |   | Weight<br>% | Total |
|----|--|--------|---|---|---|---|-------------|-------|
|    |  | 1      | 2 | 3 | 4 | 5 |             |       |
|    | <p>and maintaining a cloud call centre and end-to-end telephony solution)</p> <p><u>Ratings to be awarded as follows:</u></p> <ol style="list-style-type: none"> <li><b>Score 1</b> = no CV's submitted, No accreditation/certification by any OEM for cloud-based solution.:</li> <li><b>Score 2</b> = Less than 3 CVs with accreditation/certification for the proposed cloud-based Solution by OEM with less than three years' experience.</li> <li><b>Score 3</b> = 3 CVs with valid accreditation/certification by proposed OEM solution with three years' experience</li> <li><b>Score 4</b> = 4 CVs with valid accreditation/certification by proposed OEM solution with more than three years but less than five years' experience.</li> <li><b>Score 5</b> = 5 CVs or more with valid accreditation/certification by proposed OEM solution with more than five years' experience.</li> </ol> <p><b>*Note:</b> 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.</p> |        |   |   |   |   |             |       |
| 4  | <p><b>Project plan</b></p> <p>Submit a detailed project plan with timelines, and key milestones for solution to be rolled out, from date of appointment. Project management tools &amp; techniques</p> <p><u>Ratings to be awarded as follows:</u></p> <ol style="list-style-type: none"> <li><b>Score = 1:</b> No project plan submitted.</li> <li><b>Score = 2:</b> Poor project plan</li> <li><b>Score = 3:</b> Good project plan with realistic dates, plan adequately aligned with CIPC requirements, Tools, techniques, samples provided.</li> <li><b>Score =4:</b> Detailed project plan, plan adequately aligned with CIPC requirements plus one value add; with detailed samples, templates, tools used in the past projects indicated</li> <li><b>Score = 5:</b> Excellent project plan, plan adequately aligned with CIPC requirements with many value adds; detailed samples, templates, tools used in the past projects indicated with additional reporting/feedback and management meetings with CIPC</li> </ol>   |        |   |   |   |   | 20          |       |

| No           | Evaluation Criteria   | Rating |   |   |   |   | Weight<br>% | Total |
|--------------|---|--------|---|---|---|---|-------------|-------|
|              |   | 1      | 2 | 3 | 4 | 5 |             |       |
| 5            | <p><b>Technical Scope Requirements Refer to above par 6 (6.1 to 6.27)</b></p> <ul style="list-style-type: none"> <li><b>NB:</b> Bidders must respond systematically, and address separately and clearly mark all requirements, indicate understanding, approach, methodology, technology, systems etc. to be used as per TOR from point 3.1 to point 3.25.</li> <li>The scope of a cloud-based call centre and end-to-end telephony solution which enables the CIPC to interact with its internal as well as external stakeholders via an integrated system, irrespective of locality or device must be properly articulated.</li> </ul> <p><u><b>Ratings to be awarded as follows:</b></u></p> <ol style="list-style-type: none"> <li><b>Score = 1:</b> Proposal does not address the above requirements</li> <li><b>Score = 2:</b> Proposal covers some of the requirements of the document</li> <li><b>Score = 3:</b> Proposal covers all of the CIPC requirements outlined in the document and all required documents provided,</li> <li><b>Score =4:</b> Proposal covers all the CIPC requirements outlined in the document, all required documents provided, methodology technology/systems</li> <li><b>Score =5:</b> Detailed proposal covers all of the CIPC requirements outlined in the document, all required documents provided, approach, methodology, technology/systems and value add</li> </ol> |        |   |   |   |   | 40          |       |
| <b>TOTAL</b> |   |        |   |   |   |   | <b>100</b>  |       |

**Note:**

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.

BIDDERS THAT ACHIEVE LESS THAN 60 POINTS ON FUNCTIONALITY WILL BE DISQUALIFIED FOR FURTHER EVALUATION

**PHASE 3: 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

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         |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b> |

1. 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: Bidders to submit valid and compliant B-BBEE Certificate as well as the CSD report. The B-BBEE Certificate is used as our primary verification document to claim points for specific goals for this bid. Failure to submit a compliant B-BBEE certificate will result in disqualification**
2. 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 | <b>HDI, Race are black persons (ownership)*</b><br>100% black ownership = 10 points<br>and based on percentage pro rata for black ownership less than 100%<br>eg: 67% = 6.7 points                          | <ul style="list-style-type: none"> <li>• B-BBEE Certificate</li> <li>• CSD Registration report</li> <li>• CIPC Company Registration</li> </ul> <p><i>Important the CSD will be used as our primary verification documents</i></p> | 10                        |
| 2 | <b>Gender are women (ownership)*</b><br>100% or more women ownership = 8 points<br>and based on percentage pro rata for black ownership less than 100%<br>eg: 50% = 4.0 points                              | <ul style="list-style-type: none"> <li>• B-BBEE Certificate</li> <li>• CSD Registration report</li> <li>• CIPC Company Registration</li> </ul> <p><i>Important the CSD will be used as our primary verification documents</i></p> | 8                         |
| 3 | <b>Disability are disabled persons (ownership)*</b><br>WHO disability guideline<br>100% ownership = 2 points<br>and based on percentage pro rata for black ownership less than 100%<br>eg: 50% = 1.0 points | <ul style="list-style-type: none"> <li>• Confirmation of Disability Form as per SARS (ITRDD Form)</li> <li>• Medical Certificate</li> </ul> <p><i>Important the CSD will be used as our primary verification documents</i></p>    | 2                         |

3. **Important: Bidders to submit valid and compliant B-BBEE Certificate as well as the CSD report. The B-BBEE Certificate the primary verification document to claim points for specific goals for this bid. Failure to submit a compliant B-BBEE certificate will result in disqualification.**

- 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.

## 32. ANNEXURE “A”

### BID PRICING SCHEDULE

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

**TABLE 1:**

| No | PRICING INSTRUCTIONS: BIDDERS TO COMPLY WITH ALL REQUIREMENTS  |
|----|--|
| 1. | <b>Applicable Currency:</b><br>All prices shall be quoted in South African Rand.   |
| 2. | <b>Completion of Pricing Schedule:</b><br>Bidders shall complete the pricing schedule in full, inserting all the information required therein.<br>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. | <b>Applicability of Quoted Prices:</b><br>All quoted prices must remain firm for the duration of the contract, unless stipulated otherwise in the special conditions of contract.<br>The condition must be stated in SBD3.3<br>Bidders to note that price validity is one hundred and twenty days (120) days<br>The service provider must clearly indicate whether the price is firm or subject to the Statutory Wage Increase                               |
| 4. | <b>Total Bid Cost:</b><br>Prices quoted must include all applicable taxes including VAT, less all unconditional discounts, plus all costs to deliver the services and/or goods.<br>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                      |
| 6. | <b>Bid Price Calculation:</b><br>Bidders to not that estimates of quantities are provided to allow for the calculation of a bid price that allows equal comparison between bidders.  |
| 8. | <b>Applicable SBD Document to be included in the USB as well as sealed Pricing envelop</b><br><br><b>THIS PRICING SCHEDULE (ANNEXURE H (“A”))</b><br><b>SDB 3.3: PRICING SCHEDULE</b><br><b>SDB FORM 1: INVITATION TO BIDS FOR</b><br><b>A BIDDER <i>MUST</i> ATTACH PRICE BREAKDOWN IN THE BIDDER’S COMPANY LETTERHEAD SIGNED BY AUTHORISED REPRESENTATIVE</b>  |

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

**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, integration with CIPC systems, maintenance and support.
- On-site support as and when requested during the maintenance period (200 hours per year; – Unlimited remote support. **CIPC should not be charged extra for transport to CIPC offices.** (where applicable)
- Ability to upgrade/scale to allow for additional functionality and/or licences on pay-as-you-go basis. There should be an option to discontinue with a specific service without a lengthy waiting period if required.
- CIPC should not be charged extra for transport to CIPC offices during installation or maintenance and support, or for meetings.
- The following pricing table needs to be completed:

**TABLE 2**

| No                             | PRICING  | Once off fee | Year 1 (VAT Incl) | Year 2 (VAT Incl) | Year 3 (VAT incl) | Year 4 (VAT incl) | Year 5 (VAT Incl) | TOTAL (Vat inclusive) |
|--------------------------------|--|--------------|-------------------|-------------------|-------------------|-------------------|-------------------|-----------------------|
| 1                              | Setup / configuration  |              |                   |                   |                   |                   |                   |                       |
| 2                              | Project management during roll-out   |              |                   |                   |                   |                   |                   |                       |
| 3                              | Training   |              |                   |                   |                   |                   |                   |                       |
| 4                              | Software acquisition<br>LICENSES - Quote should be based on 100 licenses<br>Licenses need to be based on <b>pay per usage. (For Call centre)</b>   |              |                   |                   |                   |                   |                   |                       |
| 5                              | Software acquisition<br>LICENSES telephony system - Quote should be based on 700 licences.<br>Licenses need to be based on <b>pay per usage. (Rest of the organisation and its branches)</b> |              |                   |                   |                   |                   |                   |                       |
| 7                              | Services costs:<br>• Call services<br>• Text and speech analytics<br>• Other (Elaborate)   |              |                   |                   |                   |                   |                   |                       |
| 8                              | Support<br>(On-site and remote)  |              |                   |                   |                   |                   |                   |                       |
| 9                              | Any other costs (Elaborate)  |              |                   |                   |                   |                   |                   |                       |
| <b>TOTAL PRICE FOR 5 YEARS</b> |  |              |                   |                   |                   |                   |                   |                       |

**TABLE 2**

| No                             | PRICING  | Once off fee | Year 1 (VAT Incl) | Year 2 (VAT Incl) | Year 3 (VAT incl) | Year 4 (VAT incl) | Year 5 (VAT Incl) | TOTAL (Vat inclusive) |
|--------------------------------|--|--------------|-------------------|-------------------|-------------------|-------------------|-------------------|-----------------------|
| 1                              | Setup / configuration  |              |                   |                   |                   |                   |                   |                       |
| 2                              | Project management during roll-out   |              |                   |                   |                   |                   |                   |                       |
| 3                              | Training   |              |                   |                   |                   |                   |                   |                       |
| 4                              | Software acquisition<br>LICENSES - Quote should be based on 100 licenses<br>Licenses need to be based on <b>pay per usage. (For Call centre)</b>   |              |                   |                   |                   |                   |                   |                       |
| 5                              | Software acquisition<br>LICENSES telephony system - Quote should be based on 700 licences.<br>Licenses need to be based on <b>pay per usage. (Rest of the organisation and its branches)</b> |              |                   |                   |                   |                   |                   |                       |
| 7                              | Services costs:<br>Call services<br>Text and speech analytics<br>Other (Elaborate)   |              |                   |                   |                   |                   |                   |                       |
| 8                              | Support<br>(On-site and remote)  |              |                   |                   |                   |                   |                   |                       |
| 9                              | Any other costs (Elaborate)  |              |                   |                   |                   |                   |                   |                       |
| <b>TOTAL PRICE FOR 5 YEARS</b> |  |              |                   |                   |                   |                   |                   |                       |

[PLEASE CARRY OVER THE PRICE ABOVE TO SBD 1 AND SBD 3.3](#)

**BID PRICE FOR A PERIOD OF TEN (10) YEAR**

**TO BE CARRIED OVER TO SBD FORM 1 AND SBD FORM 3.3 -PRICING SCHEDULE**

[FAILURE TO COMPLY WITH ALL THE ABOVE REQUIREMENTS FOR COSTING SHALL IMMEDIATELY INVALIDATE THE BID.](#)

### 33. BRIEFING SESSION

PLEASE NOTE THAT THERE IS A COMPULSORY BRIEFING SESSION SCHEDULED FOR THIS.

|   |   |
|---|---|
| <b>COMPULSORY</b>   | BRIEFING SESSION  |
| <b>DATE:</b>  | 06 MARCH 2025   |
| <b>TIME</b>   | 11:00 AM  |
| <b>ONLINE</b>   | VIA MS TEAM   |
| <b>MEETING LINK - MS TEAMS</b>  | Meeting ID: 391 697 325 276 87<br>Passcode: mn9K8cr6  |
| <a href="https://teams.microsoft.com/meet/39169732527687?p=aMsoxb0PiLxGLpXC7y">https://teams.microsoft.com/meet/39169732527687?p=aMsoxb0PiLxGLpXC7y</a> |   |
| <b>IMPORTANT NOTE TO BIDDERS: -</b>   | <i>This is a compulsory briefing session, FAILURE TO ATTEND IMMEDIATELY DISQUALIFIES YOUR BID</i> |

### 34. SUBMISSION OF PROPOSALS

Sealed proposals will be received at the Tender Box at the main gate, 77 Mentjies Street, Sunnyside, the DTIC campus,

Proposals should be addressed to:

Manager (Supply Chain Management)

Companies and Intellectual Property Registration Office

the dtic Campus, 77 Meintjies Street,

Sunnyside

PRETORIA

### 35. ENQUIRIES

#### A. Supply Chain Enquiries

Ms Ntombi Maqhula OR Mr Solomon Motshweni

Contact No: (012) 394 3971 /45344

E-mail: [Nmaqhula@cipc.co.za](mailto:Nmaqhula@cipc.co.za) OR [SMotshweni@cipc.co.za](mailto:SMotshweni@cipc.co.za)

#### B. Technical Enquiries

Mr. Ofentse Habedi – E-mail : [Ohabedi@cipc.co.za](mailto:Ohabedi@cipc.co.za)

Ms. Magda Swemmer –: E-mail: [Mswemmer@cipc.co.za](mailto: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.*

### 36. DEADLINE FOR SUBMISSION

**BIDS OPENING DATE:** 18 FEBRUARY 2026

**BIDS CLOSING TIME:** 11: 00 AM

**COMPULSORY BRIEFING SESSION:** 06 MARCH 2026

**BIDS CLOSING DATE:** 20 MARCH 2026

**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, TIME OUSLY.**

**CIPC SHALL NOT BE HELD RESPONSIBLE FOR DELAYS IN THE POSTAL SERVICES AND BIDS DEPOSITED IN THE INCORRECT BID BOX. BID PROPOSAL MUST BE HAND DELIVERED TO THE CIPC BID BOX AT THE DTIC MAIN GATE".AT 77 MEINTJIES STREET, SUNNYSIDE**