

TERMS OF REFERENCE

BIDDERS ARE HEREBY INVITED TO SUBMIT BIDS IN RESPECT OF THE FOLLOWING SERVICE:

THE UPGRADE OF THE EXISTING ATOS UNIFY OPENSCAPE CALL CENTRE SYSTEMTO A CLOUD VOICE SOLUTION, CONFIGURATION, IMPLEMENTATION OF THE OFFICE VOICE SOLUTION INTEGRATED TO THE CONTACT CENTRE SYSTEM, ISSUING OF THE NATIONAL TELEPHONE NUMBERS TO THE NCC, SUPPORT AND MAINTENANCE. 36-MONTH CONTRACT WITH IMPLEMENTATION IN TWO PHASES.

Reference: NCC/ 04 /2023/2024

Date issued: 12 January 2024.

Compulsory briefing session: 23 January 2024 @11am.

Closing date and time: 12 February 2024 @ 11am. Bid validity period: 90 days after closing date.

ADDRESS:

National Consumer Commission

SABS Campus, Building C,

1 Dr Lategan Road,

Groenkloof,

Pretoria

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1. PURPOSE

To request proposals for the upgrade of the existing call center solution Atos Unify OpenScape to the latest Cloud Hosted Atos Unify OpenScape system available in South Africa. The proposals to include implementation, subscription, end user training, support, and maintenance costs in line with the scope of work. The implementation will be in two phases over the contract duration of 36 months. Phase one (1) the implementation of the contact center solution and phase two (2) the implementation of the office telephone voice services.

2. BACKGROUND

- 2.1. The National Consumer Commission (NCC), herein referred to as the Commission, is a juristic person established in terms of section 85 of the Consumer Protection Act; No 68 of 2008 ("Act"), as an organ of the state within the public administration but as an institution outside the public service. The NCC has been operational since 1 April 2011. The main objective of the NCC is to, amongst other things, promote and advance the social and economic welfare of consumers in South Africa by: -
 - 2.1.1. Establishing a legal framework for the achievement of a consumer market that is fair, accessible, efficient, sustainable, and responsible.
 - 2.1.2. Reducing and ameliorating any disadvantages experienced by vulnerable consumers in accessing goods or services.
 - 2.1.3. Promoting fair business practices & protecting consumers from improper conduct.
 - 2.1.4. Improving consumer awareness and encouraging choice.
 - 2.1.5. Promoting consumer confidence and empowerment.
 - 2.1.6. Providing a consistent, accessible, and efficient system of consensual resolution of disputes; and
 - 2.1.7. Providing an accessible, consistent, harmonized, effective, and efficient system of redress for consumers.
- 2.2. The NCC has about 100 employees and operates from a head office within the SABS premises. There are no regional offices, however, the NCC supports a hybrid working environment where there is a rotation base system to work at home or in the office.

2.3. NCC's current ICT Backend Infrastructure

The current NCC ICT infrastructure and systems comprise at least of:

2.3.1. ICT backend infrastructure:

- 2.3.1.1. Two fail-over and load-balancing 100Mbps WAN links,
- 2.3.1.2. Four Hyper-Converged Infrastructure servers (Hewlett-Packard Enterprise (HPE) servers)
- 2.3.1.3. One HPE Backup and Management Server
- 2.3.1.4. One HPE Tape Library,
- 2.3.1.5. Two Cisco ISR 4461 routers and two 48-port Cisco Catalyst 9500 core switches,
- 2.3.1.6. Information security solutions (Fortigate Firewall, Forti Analyser, GFI LAN Guard, Symantec Antivirus (Datacentre Cloud Security).
- 2.3.1.7. Disaster Recovery as a service through a government entity (based on the outcome of this project, the NCC may relook at its ICT DR needs)

2.3.2. Line of business systems

Line of business systems are hosted on-premises and include at least:

- 2.3.2.1. Sage 300 ERP
- 2.3.2.2. VIP (to be upgraded to Sage 300 People)
- 2.3.2.3. Opt-Out Registry System (critical business system to be used nationally by all consumers and direct marketers)

- 2.3.2.4. Hybrid email system (Office 365 and on-premises Exchange)
- 2.3.2.5. Atos Unify OpenScape contact centre system (to be upgraded to a hosted system)

3. BUSINESS DRIVER FOR UPGRADING TO A HOSTED ATOS UNIFY OPENSCAPE SOLUTION

- **3.1.** The NCC is on the digital transformation path to improve its business operations to serve the South African Public easier, better, and faster.
- **3.2.** Currently the NCC utilises two voice systems that are not integrated. One system Atos Unify OpenScape is used by the call centre and the majority of the end users utilise a different system provided by the SABS.
- **3.3.** NCC agents and staff are unable to dial/ access the voice systems when they are away from home which impedes on the NCC from transitioning into a modern-day business where employees can consume business system remotely.
- **3.4.** To leverage from existing call centre license and get the cost benefit of upgrading vs purchasing new licenses from scratch.
- **3.5.** Mitigate business risks associated with on-premises solutions running on aging hardware.
- **3.6.** Flexibility and scalability in terms of both licenses and functionality.

4. SCOPE OF WORK

The functionality required by the NCC for both phases one and two includes at least the following:

4.1. Hosted Contact Center system - Phase one (To be completed by 30 April 2024)

- 4.1.1. A scalable contact center system where agents can be added or removed from the call center pools as and when required. The contact center solution should have the following minimum functionality as part of the phase one implementation which must be completed by 30 April 2024:
 - The agents and supervisors must be able to access the system both on-premise and remotely.
 - b) The system must be user-friendly, easy to use, and allow for business continuity where agents can log in to the browser and access the system without depending on the software being installed locally on their computers. All agents are to run on softphones.
 - c) The NCC is currently not utilizing its full license count, refer to **Annexure B** for license details.
 - Concurrent agent licenses must be upgraded to a combination of licenses to achieve the below:
 - 15 x Openscape Essential user licenses.
 - 6 x Multichannel user licenses

- 3 x wall board licenses (performance dashboards to be displayed on various screens – the bidder to quote for the correct license. This is not for call center agents)
- 3 x supervisors (The bidder to quote for the correct license)
- Monitored mailbox licenses (part of the multichannel licenses).
 - Unique email ref number managed within the contact centre system.
 - Email service level reporting
- · Webchat (part of the multichannel licenses).
- d) Listen-in function to allow the supervisor to listen in on calls without the caller or agent knowing.
- e) Barge-in functionality to allow the supervisor to barge in and take over a call from the agent.
- f) Whisper function to allow the supervisor to train/guide the agent during the call.
- g) 3-way calling / Conferencing capability
- h) Call queuing
- i) Call back feature.
- j) Hunt group functionality to allow for automatic routing of calls based on agent availability.
- Music on hold (must have the functionality tocustomize music and messages of the NCC values, principles, and service standards)
- I) Ability to log agents in and out of queues.
- m) Tea and lunch break timeslots not overridable by agents. Only the supervisor can override.
- n) Voice Mails/Auto-attendance
 - should have the functionality to have multiple, standard pre-recorded messages.
 - have the ability to customize messaging for unforeseen downtime.
- o) SLA-based reporting and Dashboard. The system should have standard contact center reports at the click of a button without a need for the supervisor to perform manual calculations for a certain reporting period. At a minimum, the reporting with defined service levels for real-time and historical reporting must include
 - Average time on the call per agent
 - Average waiting time

- Answered calls
- Abandoned calls
- o Idle time
- Agent On call
- Agent productivity per individual agent
- Customer satisfaction score
- Email report on licensed mailboxes.
- p) Ability to perform quality control which may include authorized users being able to access recordings and services within the contact center ecosystem.

4.2. Call Recording (Phases One and Two)

- a) Call recording for incoming and outgoing calls to the contact center
 - Ability to search recordings by number for quick retrieval.
- Call recording for the office voice system will be implemented during phase two of the implementation.
- c) For the duration of the contract (minimum)

4.3. Telephone Management System For Billing (Phases One and Two)

- a) Telephone Management system for monthly Billing.
 - Monthly usage per user
 - Ability to identify the call details (number, duration of the call, and costs)
 - Ability to soft lock the user when the budget is exceeded.

4.4. Data Residency & Security (For the duration of the contract)

- a) Full audit trail for system changes and activities performed by agents.
- b) Role-based access
- c) Cloud-based system hosted within the borders of South Africa
- d) The system is replicated in at least two data centers for Disaster Recovery/Business Continuity capability.
- e) Data encryption in transit and at rest.
- f) The NCC reserves the right to audit the service provider security, risks, and processes as and when required to be defined in the SLA

- g) The service provider must have a defined process to hand over the data to the NCC upon termination of the contract. The details to be included in the SLA
- h) The Service provider must have defined data privacy and incident management policies.

4.5. Integration

- a) Single sign-on (AD Integration)
- b) MS 365 integration
- c) API integration with 3rd party solutions such as the in-house built eServices and Opt-out registry system with consumers' user contact information, and history of logged complaints with reference numbers. Hourly rate for integration related work to be quoted as optional.
- d) Webchat functionality

4.6. Maintenance and Support (For the duration of the contract)

- a) 36 months post-implementation support and maintenance contract
- b) 08h00 17h00: office hours
- Quick response and resolution times to be agreed by both parties during SLA negotiations.
- d) Afterhours support as and when high-priority incidents occur
- e) A minimum of 99% systems availability monthly
- f) Annual security testing on the hosted platform.
- g) Daily data backups. Data backup restores on regular basis.
- h) Monthly SLA meetings. The service provider to submit a monthly report outlining:
 - Support ticket logged with resolution times.
 - Changes/enhancements
 - Cyber security incidents
 - Data backup and recovery status
- i) Local support team

4.7. Office Voice Solution (Phase Two)

- a) The NCC utilizes the M365 E3 licenses. The system must have the ability to integrate with teams in the future where NCC may have some users on MS Teams through the use of a SBC and have some end users on direct extensions.
- b) 75 x direct extensions

- c) Integrate the office voice solution with the contact center:
 - Ability to transfer calls to and from the contact centre to office users.
 - Internal calls within NCC to be treated as free calls.
- d) Call recording for office users:
 - o All incoming and outgoing calls must be recorded.
- e) Ability to access the office landline remotely through the user of a mobile application.
- f) Free or busy information

4.8. Training (Phases One and Two)

- a) Contact centre agents training (Phase One)
- b) ICT personnel training (Phases One and Two)
- c) NCC staff training (Phase Two)

4.9. General requirements (Phases One and Two)

- a) Numbers requirements:
 - o The numbers must be registered to the NCC.
 - One x national number for the contact centre (to ensure the cost of a telephone call is the same regardless of the province of the member of the public will be calling from)
 - One x national number for switchboard (part of phase two)
 - Eight x direct national numbers for use by divisional heads' offices (part of phase two implementation – NCC may decide to reduce these numbers)
- b) IVR functionality
- c) Multi-level IVR (at least 3 levels)
- d) Mobile application accessible on both Android and IOS devices (office telephone system)
- e) The solutions should support a mobile app, desktop soft clients, and handsets.
- f) Support mainstream browsers such as Chrome and MS Edge
- g) Telephone directory searchable by name

5. SPECIAL CONDITIONS

5.1. National Consumer Commission Reserves the Right:

- 5.1.1. To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
- 5.1.2. To accept part of a tender rather than the whole tender.
- 5.1.3. To contact references provided by the bidders.

5.1.4. To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after proposals have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.

6. EVALUATION CRITERIA

The NCC will evaluate all proposals in terms of the Preferential Procurement Policy Framework Act. No.5 of 2000 (PPPFA). A copy of the PPPFA regulations can be downloaded from www.treasury.gov.za. In accordance with the PPPFA, submissions will be adjudicated on the 80/20 points system and the evaluation criteria.

The NCC has set minimum standards, referred to as phases that a bidder needs to meet to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

Pre-qualification Criteria	Technical Evaluation	Price and Preference Points
(Phase 1)	Criteria (Phase 2)	Evaluation
		(Phase 3)
Bidders must submit all	Bidder(s) are required to	Bidders will be evaluated as per the
documents as outlined in	achieve a minimum of 70	PPPFA, where 80 points
paragraph 6.1.1 (Table 1)	points out of 100 points to	
below.	proceed to Phase 3 (Price and	will be for price and 20 points for
Only bidders that comply	Preference Points).	preference points.
with ALL these criteria will		
proceed to Phase 2.		

6.1. PHASE 1 - ADMINISTRATIVE AND MANDATORY COMPLIANCE:

6.1.1. Without limiting the generality of the Commission's other critical requirements for this Bid, bidders must submit the documents listed in Phase 1 below. All documents must be completed and signed by the duly authorized representative of the prospective bidders. During this phase, bidders' responses will be evaluated based on compliance with the listed administration and mandatory bid requirements. The bidders' proposals may be disqualified for non-submission of some of the documents.

Administrative	Guideline	Consequence of Non
Compliance Documents	Guideline	Consequence of Non- submission of
Documents		Information:
		Disqualification?
Invitation to Bid – SBD 1	Complete, sign, and submit the	NO
	provided pro forma document.	
Tax status – Compliant	i. Tax Compliance will be	NO
	verified on the Central	
	Supplier Database (CSD).	
	ii. Supplier to be Tax-	
	Compliant before an award	
	is made and throughout	
	the contract period.	
	iii. CSD Supplier number will be	
	used to verify Tax	
	Compliance.	
Bidder's Disclosure-	Complete and sign the supplied	YES
SBD 4	pro forma document.	
Preference Point Claim Form –	Complete and sign the supplied	NO
SBD 6.1	pro forma document. Preference	
	points will be verified using the	
Registration on Central	CSD. The Service Provider must be	NO
Supplier Database (CSD)	registered as a service provider	
, ,	on the Central Supplier	
	Database (CSD). If not	
	registered, the service provider	
	must visit	
	https://secure.csd.gov.za/ to	
	register on the CSD. An award	
	will not be made to any bidder	
	who is not registered on the	
	CSD. Furthermore, no	
	preference points will be	
	allocated to bidders who are not	

Pricing Schedule – SBD 3 and	Submit full details of the pricing	YES
Annexure A	proposal in a separate envelope	
	ONLY and not as part of the	
	proposal. Non-compliance will	
	lead to disqualification.	
Partner accreditation	Letter or certificate confirming that	YES
	the bidder is accredited to sell,	
	implement, and support the product	
	quoted for	
Product description and features	Product brochure listing all the	NO
	feature set of the product quoted	
	for	

6.2. PHASE 2 - FUNCTIONALITY EVALUATION

- 6.2.1. Only bidders that have met the Pre-Qualification Criteria in **Phase 1** will be evaluated in Phase 2 for Functionality, and will be evaluated as follows:
 - a) Functional Evaluation Bidders will be evaluated out of 100 points and bidders are required to achieve a minimum threshold of 70 points. The Bid Evaluation Committee (BEC) will evaluate proposals and bidders will require a minimum score of 70 to proceed to phase 3 which is price and preference points.

Evaluation Area	Evaluation Criteria	Points
Project implementation plan	The project implementation plan must assume a project start date and cover at least the following aspects, taking into consideration that phase one implementation should be finalized by 30 April 2024: Timelines Deliverables in line with the scope of work Project resources Training plan and skills transfer	15
	The implementation plan fully covers all the aspects listed above	15
	The implementation plan partially covers all the aspects listed above	7

	Implementation plan not provided or does not cover any of the aspects listed above	0
Bidder's experience	Number of similar projects (implementing and supporting	45
	Atos Unify Openscape voice solution including cloud	
	migration/cloud hosting) completed within the past 5 years.	
	Provide reference letters containing:	
	Name of the company where the project was	
	implemented.	
	Description of the project	
	Year the project was implemented.	
	 Contact person (Name, surname, telephone number, 	
	and email address.	
	The NCC reserves the right to contact the references to	
	•	
	verify the information provided.	45
	5 or more projects	45
	4 projects	35
	3 projects	25
	2 projects	15
	1 project	5
	0 projects	0
Bidders team qualifications and experience	Provide Information on the individuals who will be assigned to this project. Detailed CVs and proof of training must be attached. Proof of training must be a certification for the product quoted for.	40
	 The Bidder has 5 or more team members experienced in implementing the Atos Unify OpenScape voice solution. At least 5 team members are certified 	40
	 The Bidder has 3 – 4 team members experienced in implementing Atos Unify OpenScape voice solutions. At least 3 team members are certified. 	20
	 The Bidder has 2 team members experienced in implementing Atos Unify OpenScape voice solutions. Both members are certified. 	10
	The Bidder has 0 - 1 team members with experience in implementing Atos Unify OpenScape voice solution.	0

6.3. PHASE 3 - PRICE AND PREFERENCE POINTS EVALUATION

- 6.3.1. Only Bidders that have met the **70-point** threshold for functionality will be evaluated in phase 3 for price and preference points.
- 6.3.2. In terms of regulation 6 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated on the 80/20-preference point system in terms of which points are awarded to bidders on the basis of:
 - The bid price (maximum 80 points)

Specific Goals (maximum 20 points)

a) Stage 1 - Price Evaluation (80 Points)

Price Evaluation	
$Ps = 80 \left(1 - \frac{Pt - P\min}{P\min} \right)$	80

The following formula will be used to calculate the points for price:

Where;

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

b) Stage 2 – Specific Goals Evaluation (20 Points)

Specific Goals Points allocation

A maximum of 20 points may be allocated to a bidder for attaining the specific goals in accordance with the table below:

Specific Goals	Number of Points
100% Black owned	6
51-99% Black owned	4
100% women-owned	6
51% to 99% women-owned	4
5% Youth Ownership	2
2% Owned by persons with disabilities	1

Terms of Reference: Contact Center System Upgrade and Office Voice Solution.

Exempt Micro Enterprise (EME)	5
Qualifying Small Enterprise (QSE)	3
Large Enterprise	0

Points for Specific Goals may be allocated to bidders on the submission of the following documentation or evidence:

- A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1)
- B-BBEE Certificate
- CSD Report

7. PRESENTATION / DEMONSTRATION

The NCC reserves the right to request presentations from the short-listed Bidders as part of the bid evaluation process. Should this be necessary. Bidders will be notified. The NCC shall not be liable for any costs related to the bidder participating in this Bid.

8. GENERAL CONDITIONS OF CONTRACT

- 8.1. Any award made to a bidder(s) under this bid is conditional upon:
- 8.1.1. The bidder(s) accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which National Consumer Commission is prepared to enter into a contract with the successful Bidder(s).

9. SUBMISSION OF PROPOSALS

9.1. All tenders must be clearly marked: "For attention: The Manager: Supply Chain Management, with the Tender Reference number included and delivered at the reception, in the NCC's tender box, at the following address:

The National Consumer Commission

SABS Campus, Reception,

1 Dr. Lategan Road,

Groenkloof.

Pretoria

- 9.2. Bid documents shall only be considered when received by the Commission before the closing date and time.
- 9.3. The bidder(s) are required to submit two (2) copies, and one (1) original. Each submission must be marked correctly and sealed separately for ease of reference during the evaluation process.
- 9.4. Bidders are required to submit the pricing schedule in a sealed and marked envelope. Bidders are not supposed to write pricing anywhere on the tender document and their proposals.

9.5. Bidders are requested to *initial each page* of the tender document on the right-hand side at the bottom of each page.

10. ENQUIRIES

For SCM Inquiries:

Name: Margery Mouton Contact: 012 428 7730

Email: m.mouton@thencc.org.za

For Technical enquiries

Name: Lindani Ngema

Contact: 012 428 7745

Email: l.ngema@thencc.org.za

remis of Reference. Contact Center System opprace and Office voice Solution.

11. ANNEXURE A - PRICING TEMPLATE

11.1. Bidders are required to complete the pricing template below for the NCC to have the annual cash flow projections for the duration of the contract.

Item Description	Quantities	Year 1 Cost (Including VAT)	Year 2 Cost (Including VAT)	Year 3 Cost (Including VAT)
Phase One (1) Costs:		•		
Provision of the contact center system licenses (Migration to Atos Unify Openscape Essential User – concurrent agents)	15			
Multichannel user licenses	6			
Supervisor/ manager licenses	3			
Full Implementation costs (contact center system, recording, IVR, webchat, email license and training of ICT personnel and NCC staff)	1			
The bidder must include all the implementation cost items				
Issuing a new contact centre number for NCC (National Number registered under NCC and to remain an NCC number when the contract ends)				
Data migration from current system to the cloud hosted system				
Call Recording - For the duration of the contract (if not included subscription costs)	All agents			
Integration costs (hour rate – future migration)	20			
PHASE 1 TOTAL (INCLUDING VAT)				
Phase Two (2) Costs: - From Year 2				
Provision of direct extension for office users	75			

Terms of Reference: Contact Center System Upgrade and Office Voice Solution.

Issuing 9 numbers (1 x reception and 8 x HODs National Numbers registered under NCC and to remain an NCC numbers when the contract ends)	9		
Implementation (office voice system, recording and training of staff and ICT personnel) The bidder must include all the implementation cost items	1		
Call Recording - For the duration of the contract (if not included subscription costs)			
Support and maintenance (Years 1 – 3) if not already included in the subscription			
PHASE 2 TOTAL (INCLUDING VAT)			
TOTAL (INCLUDING VAT) PHASE 1, PHASE 2 AND MAINTENANCE	, SUPPORT		

NB! Bidders are requested to complete the pricing template and submit it separately sealed envelope. Prices should not be written anywhere on the bidders' proposals.

12. ANNEXURE B - EXISTING LICENSE DETAILS

The National Consumer Commission (NCC) PBX Contact Centre System Technical Details

Licensing

 Locking ID:
 001AE8AC554A

 SIEL ID:
 SID:1927442710161

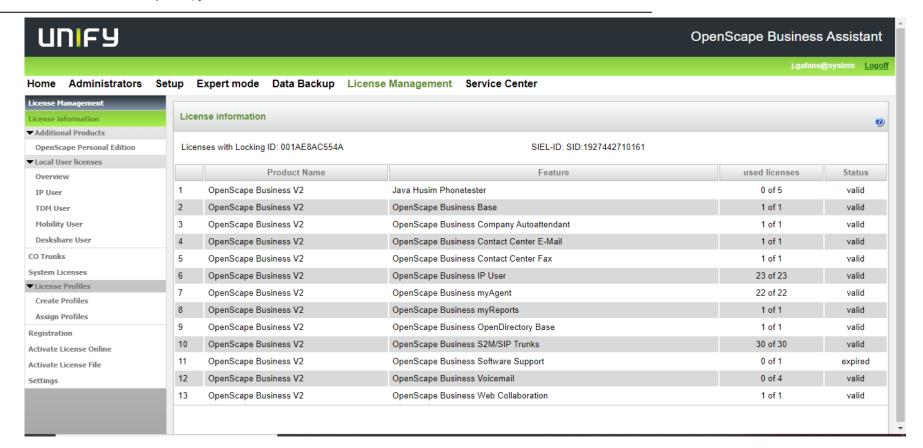
 MAC ID:
 00-1A-E8-AC-55-4A

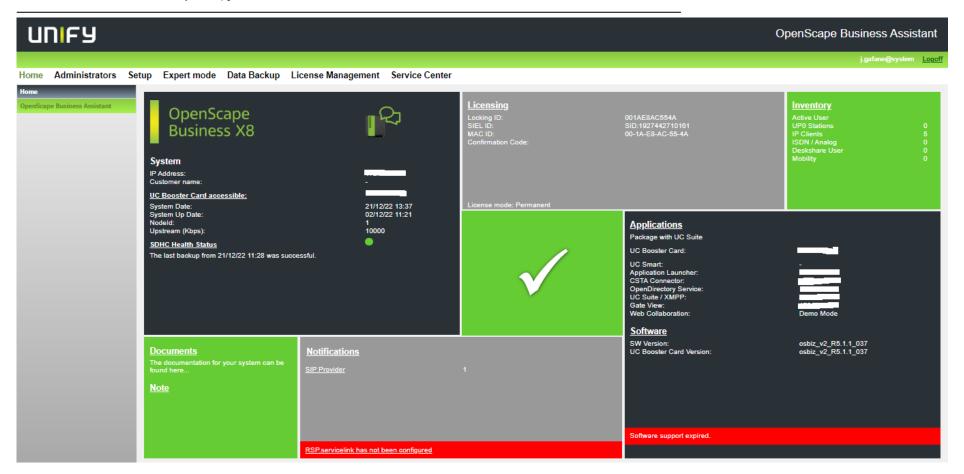
License information

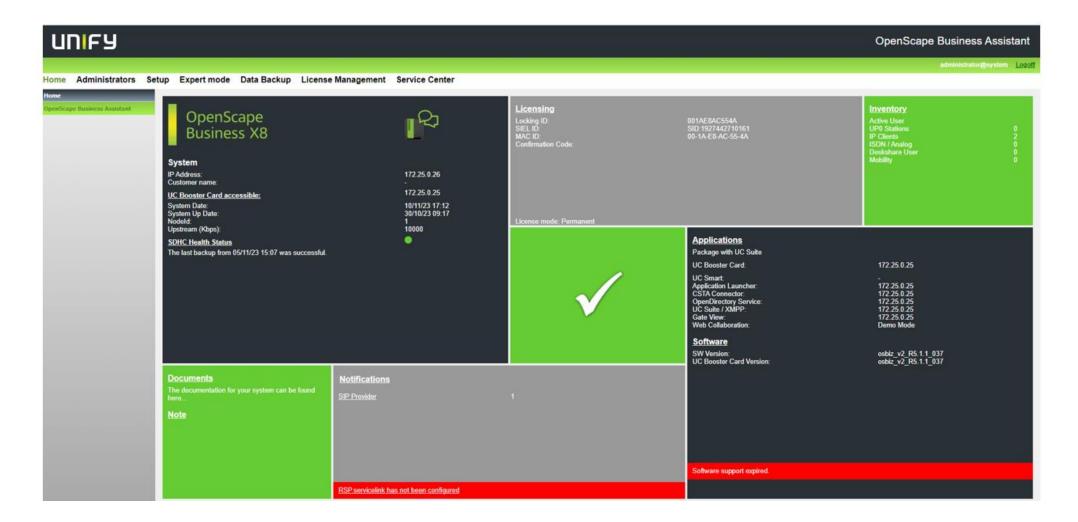
Licenses with Locking ID: 001AE8AC554A

SIEL-ID: SID:1927442710161

	Product Name	Feature	used licenses	Status
1	OpenScape Business V2	Java Husim Phonetester	0 of 5	valid
2	OpenScape Business V2	OpenScape Business Base	1 of 1	valid
3	OpenScape Business V2	OpenScape Business Company Autoattendant	1 of 1	valid
4	OpenScape Business V2	OpenScape Business Contact Center E-Mail	1 of 1	valid
5	OpenScape Business V2	OpenScape Business Contact Center Fax	1 of 1	valid
6	OpenScape Business V2	OpenScape Business IP User	23 of 23	valid
7	OpenScape Business V2	OpenScape Business myAgent	22 of 22	valid
8	OpenScape Business V2	OpenScape Business myReports	1 of 1	valid
9	OpenScape Business V2	OpenScape Business OpenDirectory Base	1 of 1	valid
10	OpenScape Business V2	OpenScape Business S2M/SIP Trunks	30 of 30	valid
11	OpenScape Business V2	OpenScape Business Software Support	0 of 1	expired
12	OpenScape Business V2	OpenScape Business Voicemail	0 of 4	valid
13	OpenScape Business V2	OpenScape Business Web Collaboration	1 of 1	valid







Terms of Reference: Contact Center System Upgrade and Office Voice Solution.

