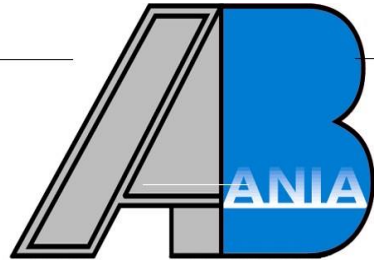


# **AZANIA BANK LIMITED**



**REQUEST FOR PROPOSAL (RFP)  
FOR  
CALL CENTRE SYSTEM WITH  
CUSTOMER RELATIONSHIP  
MANAGEMENT (CRM) CAPABILITIES  
FEBRUARY, 2022**

**RFP NO. ABL/PROC/CC/RFP/02/2022**

**Azania Bank Limited,  
Head office Mawasiliano Tower,  
Ground Floor, Sam Nujoma Road,  
P. O. Box 32089  
Dar es salaam**

**E-mail: [tenders@azaniabank.co.tz](mailto:tenders@azaniabank.co.tz)**

**Website: [www.azaniabank.co.tz](http://www.azaniabank.co.tz)**

**Telephone No. +255 22 2412025/6/7, Fax: +255 22 2412028**

## TABLE OF CONTENTS

	Page
SECTION I. <b>Letter of Invitation</b> .....	3
SECTION II. <b>Introduction</b> .....	5
SECTION III. <b>Information to consultant</b> .....	8
SECTION IV <b>Appendix to information to Consultant</b> .....	10
SECTION V <b>Schedule of Requirements</b> .....	12
SECTION VI <b>Technical &amp; Financial Evaluation</b> .....	13
SECTION VII. <b>Standard Forms</b> .....	17

**SECTION I - LETTER OF INVITATION**

**Invitation to Tender  
Date 17<sup>th</sup> February, 2022**

1. This Invitation for Tenders follows the General Procurement Notice for Provision of various Goods, Works and Service which appeared in Daily News & Mwananchi Newspapers on **03/01/2022**.
2. The **Azania Bank Limited** has set aside funds and it intends to apply part of the proceeds of this fund to payments under the contract for **Various Tender for financial year 2022 for Azania Bank Limited**.
3. Azania bank Limited intends to acquire and implement a robust **Call Centre System with Customer Relationship Management capabilities** as part of its initiatives to improve its customer Excellency through effective customer support and improving operational efficiency by providing a delightful customer experience. **Azania Bank Limited now invites** proposals from interested candidates to submit their proposals for **Call Centre System with Customer Relationship Management capabilities**
4. Interested eligible candidates may obtain the complete set of Request for Proposal (RFP) document by downloading the document from the ABL website **www.azaniabank.co.tz** select "Media" then "Tenders" OR **www.azaniabank.co.tz/azania-tenders**.
5. There shall be NO price charged for the tender document
6. **Completed Proposal Documents**, the original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked "**TECHNICAL PROPOSAL**," and the original and all copies of the Financial Proposal in a sealed envelope clearly marked "**FINANCIAL PROPOSAL**" to be delivered to Azania Bank Limited Head Office, Mawasiliano Tower Building Ground Floor along Sam Nujoma Road, Procurement Management Unit addressed to:

**Secretary Tender Committee  
Procurement Management Unit  
Azania Bank Limited  
P.O. Box32089  
DAR ES SALAAM**

To be received on or before 12:00pm on **Wednesday 9th March 2022**

7. Prices quoted should be net inclusive of all costs and taxes, must be expressed in Tanzanian shillings and shall remain valid for a period of 120 days from the closing date of the tender.
8. Tenders must be accompanied by a **Tender Security of 2%** of the quoted price in form of a guarantee from a reputable bank or an insurance company in an

acceptable form in favor of the Azania Bank Limited.

9. Tenders will be opened in the presence of the candidate's representatives who choose to attend the opening at the **Azania Bank Limited - Head Office**, Procurement Management Unit Office, Ground Floor, Mawasiliano Tower, Sam Nujoma Road **at 12.30pm on Wednesday 9th March, 2022**
10. Late applications, portion of applications, applications not received, and applications not opened and not read out in public at the tender opening ceremony shall not be accepted for evaluation irrespective of the circumstances.
11. Interested eligible applicants may obtain further information from the **Procurement Management Unit**, via email address [tenders@azaniabank.co.tz](mailto:tenders@azaniabank.co.tz)

***Azania Bank Limited reserves the right to accept or reject any or all bids and is not bound to give any reasons for its decision.***

**MANAGING DIRECTOR  
AZANIA BANK LIMITED**

## **SECTION II INTRODUCTION**

### **2.1 Introduction**

**Azania Bank Limited** is a fully-fledged Commercial Bank, offering a range of banking services where by our customers can open current accounts (Business/ Personal) and various savings accounts for individuals, SMEs, children and students. We offer a wide range of loan products, such as business loans, consumer loans and mortgage facilities; we further operate in local and international funds transfers through TISS, Telegraphic Transfers, Western union, Africash and Money gram. In the processes of mobilizing deposits and lending to businesses, we offer competitive interest rates on deposits as well as affordable interest rates on loans facilities.

The bank's operational efficiency is attributed by its good customer services, improved turnaround time for service delivery and enhanced businesses processes as the bank continued with its strategy of delivering services beyond normal banking hours in which some of our branches are now opened from 08am to 08pm every day in all 7 days of the week i.e. Sunday to Sunday, this goes in line with the present digital banking service which allows our customers to transact unlimitedly 24hours.

Azania Bank currently provides banking services at 24 locations in Tanzania as well as 8 Service centers, 2 collection centers and 7 Standalone Bureau De Change outlets which provide "Forex Exchange services. The Bank also offers services through our various Digital Banking Platforms such as Visa cards, Azania Wakala, Internet Banking and Mobile App.

To this end, **Azania Bank Limited** intends to engage services of a reputable supplier for Call Centre with Customer Relationship Management (CRM) capabilities. Azania Bank Limited is therefore soliciting for Request for proposal (RFP) from interested qualified solution providers.

### **2.2 Background and RFP Requirements**

Azania bank intends to acquire and implement a robust Call Centre System with Customer Relationship Management capabilities as part of its initiatives to improve its customer Excellency through effective customer support and improving operational efficiency by providing a delightful customer experience.

### **2.3 Purpose**

This document has been issued with the aim of providing information that will assist interested bidders and solution vendors to share Request for Proposal in implementation, testing, and commissioning of the integrated Call Centre and Customer Relationship System.

## 2.4 Disclaimer

Azania Bank reserves the right to accept or to reject any RFP submission or response and to annul the process and reject all responses at any time during the RFP evaluation, without thereby incurring any liability to any bidder

Further, this document shall not be construed as a request or authorization to perform work at the expense of Azania Bank. Any work performed and/or expenditure incurred to facilitate submission of RFP, will be at the respondent's own discretion and expense.

## 2.5 About the Request

### 2.5.1 General terms of reference of the required call center solution

The proposed solution must be a robust and full-fledged Call Centre System with Customer Relationship Management (CRM) capabilities to be able to support the following functionality at minimum:

	<b>Requirement</b>	<b>Comments and Attachments</b>
1	Call handling capabilities such as, call routing, call hunting, call recording etc	
2	Interactive Voice response capabilities	
3	Call monitoring and management tools reporting.	
4	Features for short code numbers, toll free telephone lines, web-based self-service and chats applications and e-mail support	
5	Multiple customer reporting channels such as voice call, email, text SMS and social media app reporting/integration such as WhatsApp, Facebook, tweeter, Instagram etc.	
6.	To be integrated or inbuilt with the proposed CRM capabilities such as: -	Contact management capabilities to allow customer segmentation for better tailoring of products and targeted marketing etc.
		Leading Management to provide capability to determine high quality leads helping sales team to focus on the right

		customers at the right time and right place using the rule-based scoring	
		Reports and dashboards, inbuilt reports and dashboards ad well as capability to integrate with the business Intelligence system of the core banking system.	
		Workflow automation	
		Case Management/ Customer Satisfaction surveys	

## **SECTION III INFORMATION TO CONSULTANTS (ITC)**

### **3.1.1 Introduction**

**3.1.2** The Client named in the Appendix to INFORMATION TO CONSULTANTS “ITC” will select a firm in accordance with the method of selection detailed in the Section IV - Appendix to ITC.

**3.1.3** The Tenderers are invited to submit a Technical Proposal and a Financial Proposal as specified in the Appendix “ITC” for Call Centre and Customer Relationship Management (CRM) Systems required for the assignment named in Appendix to ITC. The highest ranked firms who meet the pass mark of the technical proposal shall be financially evaluated. The final evaluation will be the basis for Contract negotiations and ultimately for a signed Contract with the selected firm.

3.1.4 The Tenderers must familiarize themselves with local conditions and take them into account in preparing their proposals. To obtain first-hand information on the assignment and on the local conditions, Tenderers are encouraged to liaise with the Client in writing regarding any information that they may require before submitting a proposal.

**3.1.5** Please note that (i) the costs of preparing the proposal and of negotiating the Contract, including any visit to ABL are not reimbursable as a direct cost of the assignment and ABL is not bound to accept any of the proposals submitted.

**3.1.6** There shall be NO price charged for the tender document

**3.1.7** The tenderer may view online the tender document.

### **3.2 Clarification and Amendment of RFP Documents**

**3.2.1** The Tenderer may request a clarification on the RFP document only up to seven [7] days before the proposal submission date. Any request for clarification must be sent in writing by paper mail, cable, telex, facsimile or electronic mail to the Client’s address indicated in the Appendix “ITC”. The Client will respond by cable, telex, facsimile or electronic mail to such requests and will send written



copies of the response (including an explanation of the query but without identifying the source of inquiry) to all invited Tenderers who intend to submit proposals.

**3.2.2** At any time before the submission of proposals, the Client may for any reason, whether at his own initiative or in response to a clarification requested by an invited firm, amend the RFP. Any amendments shall be issued in writing through addenda. Addenda shall be sent by mail, cable, telex or facsimile to all invited Tenderers and will be binding on them. The Client may at his discretion extend the deadline for the submission of proposals.

### **3.3 Preparation of Technical Proposal**

**3.3.1** The Tenderer proposal shall be written in English language

**3.3.2** In preparing the Technical Proposal, Tenderers are expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.

**3.3.3** While preparing the Technical Proposal, Tenderer must give particular attention to the following:

- i. If a Tenderer considers that it does not have all the expertise for the assignment, it may obtain a full range of expertise by associating with individual Tenderer(s) and/or other firms or entities in a joint venture or sub-consultancy as appropriate. Tenderer shall not associate with other Tenderers invited for this assignment. A tenderer associating with other Tenderers in contravention of this requirement shall automatically be disqualified.
- ii. It is desirable that majority of the key professional staff proposed be permanent employees of the firm or have an extended and stable working relationship with it.

- iii. Proposed professional staff must as a minimum, have the experience indicated in Appendix to ITC.
- iv. Alternative professional staff shall not be proposed and only one Curriculum Vitae (CV) may be submitted for each position.

**3.3.4** The Technical Proposal shall provide the following information using the attached Standard Forms;

- i. A brief description of the Tenderer and an outline of recent experience on assignments of a similar nature. For each assignment the outline should indicate inter alia, the profiles of the staff proposed, duration of the assignment, contract amount and firm's involvement.
- ii. Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by the Client.
- iii. Detailed project execution plan, including task definition and, activity time frames as per the terms of reference.
- iv. The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member and their timing.
- v. CVs recently signed by the proposed professional staff and the authorized representative submitting the proposal.
- vi. Any additional information requested in Appendix "ITC".

**3.3.5** The Technical Proposal shall not include any financial information.

### **3.4 Preparation of Financial Proposal**

**3.4.1** In preparing the Financial Proposal, Tenderers are expected to take into account the requirements and conditions outlined in the RFP documents. The Financial Proposal should follow Standard Forms. It should provide all costs associated with the. If appropriate these costs should be broken down by activity.

**3.4.2** The Financial Proposal should clearly identify as a separate amount, the local taxes, duties, fees, levies and other charges imposed under the law on the Tenderers, the sub-Tenderers and their personnel, unless Appendix “ITC” specifies otherwise.

**3.4.3** Tenderers shall express the price of their services in Tanzania Shillings.

**3.4.4** The Proposal must remain valid for 120 days after the submission date. During this period, the Tenderer is expected to keep available, at his own cost, the professional staff proposed for the assignment. The Client will make his best effort to complete negotiations within this period. If the Client wishes to extend the validity period of the proposals, the Tenderers shall agree to the extension.

### **3.5 Submission, Receipt, and Opening of Proposals**

**3.5.1** The original proposal (Technical Proposal and Financial Proposal) shall be prepared in indelible ink. It shall contain no interlineations or overwriting, except as necessary to correct errors made by the firm itself. Any such corrections must be initialed by the persons or person authorized to sign the proposals.

**3.5.2** The original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked **“TECHNICAL PROPOSAL,”** and the original and all copies of the Financial Proposal in a sealed envelope clearly marked **“FINANCIAL PROPOSAL”** and warning: **“DO NOT OPEN WITH THE TECHNICAL PROPOSAL”**.

Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address and other information indicated in the Appendix “ITC” and be clearly marked, **“DO NOT OPEN, EXCEPT IN PRESENCE OF THE OPENING COMMITTEE.”**

**3.5.3** The completed Technical and Financial Proposals must be delivered at the submission address on or before the time and date stated in the Appendix “ITC”. Any proposal received after the closing time for submission of proposals shall be returned to the respective Tenderer unopened.

**3.5.4** After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the Opening Committee. The Financial Proposal

shall remain sealed and deposited with a responsible officer of the client department up to the time for public opening of financial proposals.

### **3.6 Proposals Evaluation General**

**3.6.1** From the time the bids are opened to the time the Contract is awarded, if any Tenderer wishes to contact the Client on any matter related to his proposal, he should do so in writing at the address indicated in the Appendix “ITC”. Any effort by the firm to influence the Client in the proposal evaluation, proposal comparison or Contract award decisions may result in the rejection of the Tenderer’s proposal.

### **3.7 Evaluation of the Technical Proposals**

**3.7.1** The Tender Processing Committee appointed by ABL shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria named in the Appendix to information to Tenderers.

**3.7.2** Evaluators of Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded.

**3.7.3** Each responsive proposal will be given a technical score (St). A proposal shall be rejected at this stage if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score indicated in the Appendix “ITC”.

**3.7.4** Tenderers shall prepare the number of copies indicated in Appendix “ITC”. Each Technical Proposal and Financial Proposal shall be marked “ORIGINAL” and “COPY” as appropriate. If there are any discrepancies between the original and the copies of the proposal, the original shall prevail.

### **3.8 Public Opening and Evaluation of Financial Proposal**

**3.8.1** After Technical Proposal evaluation, the Client shall notify those Tenderers whose proposals did not meet the minimum qualifying mark or were considered non-responsive to the RFP and Terms of Reference, indicating that their

Financial Proposals will be returned after completing the selection process. The Client shall simultaneously notify the Tenderers who have secured the minimum qualifying mark, indicating the date and time set for opening the Financial Proposals and stating that the opening ceremony is open to those Tenderers who choose to attend. The opening date shall not be sooner than seven (7) days after the notification date. The notification may be sent by registered letter, cable, telex, facsimile or electronic mail.

**3.8.2** The Financial Proposals shall be opened publicly in the presence of the Tenderers' representatives who choose to attend. The name of the Tenderer, the technical. Scores and the proposed prices shall be read aloud and recorded when the Financial Proposals are opened. The Client shall prepare minutes of the public opening.

**3.8.3** The Tender Processing Committee will determine whether the financial proposals are complete (i.e. whether the Tenderer has costed all the items of the corresponding Technical Proposal and correct any computational errors. The cost of any unpriced items shall be assumed to be included in other costs in the proposal. In all cases, the total price of the Financial Proposal as submitted shall prevail.

**3.8.4** The formulae for determining the Financial Score (Sf) shall, unless an alternative formulae is indicated in the Appendix "ITC", be as follows:-

$Sf = 100 \times FM/F$  where Sf is the financial score; Fm is the lowest priced financial proposal and F is the price of the proposal under consideration. Proposals will be ranked according to their combined technical (St) and financial (Sf) scores using the weights (T=the weight given to the Technical Proposal; P = the weight given to the Financial Proposal;  $T + p = 1$ ) indicated in the Appendix ITC. The combined technical and financial score, S, is calculated as follows:-  $S = St \times T \% + Sf \times P \%$ . The firm achieving the highest combined technical and financial score will be invited for negotiations.

**3.8.5** The Tender Processing Committee shall evaluate the tender within 15 days from the date of opening the tender.

**3.8.6** Contract price variations shall not be allowed for contracts not exceeding one year (12 months).

**3.8.7** Where contract price variation is allowed, the variation shall not exceed 10% of the original contract price

**3.8.8** Price variation requests shall be processed by the procuring entity within 30 days of receiving the request.

**3.8.9** The contract is expected to start in immediately after contract signing

### **3.9 Negotiations**

**3.9.1** Negotiations will be held at the same address as “address to send information to the Client” indicated in the Appendix “ITC”. The aim is to reach agreement on all points and sign a contract.

**3.9.6** Negotiations will include a discussion of the Technical Proposal, the proposed methodology (work plan), staffing and any suggestions made by the firm to improve the Terms of Reference. The Client and firm will then work out final Terms of Reference, staffing and bar charts indicating activities, staff periods in the field and in the head office, staff-months, logistics and reporting. The agreed work plan and final Terms of Reference will then be incorporated in the “Description of Services” and form part of the Contract. Special attention will be paid to getting the most the firm can offer within the available budget and to clearly defining the inputs required from the Client to ensure satisfactory implementation of the assignment.

**3.9.7** Unless there are exceptional reasons, the financial negotiations will not involve the remuneration rates for staff (no breakdown of fees).

**3.9.8** Having selected the firm on the basis of, among other things, an evaluation of proposed key professional staff, the Client expects to negotiate a contract on the basis of the experts named in the proposal. Before contract negotiations, the

Client will require assurances that the experts will be actually available. The Client will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or that such changes are critical to meet the objectives of the assignment. If this is not the case and if it is established that key staff were offered in the proposal without confirming their availability, the firm may be disqualified.

**3.9.9** The negotiations will conclude with a review of the draft form of the Contract. To complete negotiations the Client and the selected firm will initial the agreed Contract. If negotiations fail, the Client will invite the firm whose proposal received the second highest score to negotiate a contract.

**3.9.10** ABL shall appoint a team for the purpose of the negotiations.

### **3.10 Award of Contract**

**3.10.1** The Contract will be awarded following negotiations. After negotiations are completed, the Client will promptly notify other Tenderers on the shortlist that they were unsuccessful and return the Financial Proposals of those Tenderers who did not pass the technical evaluation.

**3.10.2** The selected firm is expected to commence the assignment on the date and at the location specified in Appendix "ITC".

**3.10.3** The parties to the contract shall have it signed within 30 days from the date of notification of contract award unless there is an administrative review request.

**3.10.4** PPOA may at any time terminate procurement proceedings before contract award and shall not be liable to any person for the termination.

**3.10.5** PPOA shall give prompt notice of the termination to the tenderers and on request give its reasons for termination within 14 days of receiving the

request from any tenderer.

**3.10.6** To qualify for contract awards, the tenderer shall have the following:

- (a) Necessary qualifications, capability experience, services, equipment and facilities to provide what is being procured.
- (b) Legal capacity to enter into a contract for procurement
- (c) Shall not be insolvent, in receivership, bankrupt or in the process of being wound up and is not the subject of legal proceedings relating to the foregoing.
- (d) Shall not be debarred from participating in public procurement.

### **3.11 Confidentiality**

**2.11.1** Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to the Tenderers who submitted the proposals or to other persons not officially concerned with the process, until the winning firm has been notified that it has been awarded the Contract.

### **3.12 Corrupt or fraudulent practices**

**2.12.1** ABL requires that the Tenderers observe the highest standards of ethics during the selection and award of the consultancy contract and also during the performance of the assignment. The tenderer shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.

**2.12.2** ABL will reject a proposal for award if it determines that the Tenderer recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.

**2.12.3** Further a Tenderer who is found to have indulged in corrupt or fraudulent practices risks being debarred from participating in public procurement in Tanzania.



## **SECTION IV APPENDIX TO INFORMATION TO CONSULTANTS**

The following information for procurement of consultancy services and selection of Tenderers shall complement or amend the provisions of the information to Tenderers, wherever there is a conflict between the provisions of the information and to Tenderers and the provisions of the appendix, **the provisions of the appendix** herein shall prevail over those of the information to Tenderers.

4.1 The name of the Client is: **Azania Bank Limited** and the method of selection is: **Quality and Cost Based (QCBS)**

4.2 Separate Technical and Financial Proposals are required: **Yes**

The name of the assignment is:

**PROVISION OF CALL CENTRE SYSTEM WITH CUSTOMER RELATIONSHIP MANAGEMENT (CRM) CAPABILITIES**

4.3 A pre-proposal conference will be held: **No**

The name, address and telephone numbers of the Bank's contact official is:

**Christabella Bakuza**

**Procurement Management Unit**

**Azania Bank Limited**

**Mawasiliano Tower Building, Sam Nujoma Road**

**Ground Floor**

**P.O. Box32089**

**Dar Es Salaam**

**Tel: +255 22 2412025/6/7**

**E-mail: [cbakuza@azaniabank.co.tz](mailto:cbakuza@azaniabank.co.tz)/[tenders@azaniabank.co.tz](mailto:tenders@azaniabank.co.tz)**

4.4 The Client will provide the following inputs:

- a) ABL generated documents that may be needed/ required by the Tenderer during the course of execution of the contract.
- b) Nominate a liaison officer and counterpart staff who will work closely and maintain regular contact with the Tenderer on matters regarding this consultancy

4.5 The proposal submission address is:

**Azania Bank Limited**  
**Procurement Management Unit**  
**Mawasiliano Towers Building, Sam Nujoma Road**  
**P.O. Box32089**  
**Dar Es Salaam**

Proposals must be submitted to Procurement Management Unit Offices on Ground Floor, Mawasiliano Tower Building along Sam Nujoma Road, , Dar Es Salaam addressed to:

**Secretary Tender Committee**  
**Azania Bank Limited**  
**Procurement Management Unit**  
**Mawasiliano Towers Building Sam Nujoma Road,**  
**P.O. Box32089**  
**Dar Es Salaam**

So as to be received on or before **9<sup>th</sup> March, 2022 at 12.00pm**. Information on the outer envelope should include the address above and should contain the following information: **PROVISION OF CALL CENTRE SYSTEM WITH CUSTOMER RELATIONSHIP MANAGEMENT (CRM) CAPABILITIES RFP. NO. ABL/PROC/CC/RFP/02/2022**

4.6 The minimum required experience of proposed professional staff is: as in the Evaluation Criteria in the Section IV .This information is fully provided for in the Terms of Reference and shall form part of the evaluation criteria.

4.7 Taxes: All applicable taxes to be included in the Financial Proposals

4.8 The Tender Validity period is 120 days after date of tender Opening i.e. 24th February, 2022.

4.9 Consultants must submit Original and one (1) Copy each of the technical

and financial proposal.

4.10 Proposals must be submitted no later than Wednesday, **9<sup>th</sup> March, 2022 at 12.00pm**

4.11 The Technical proposal shall be opened by the Tender Opening Committee on **Wednesday, 9<sup>th</sup> March, 2022 at 12.30pm.**

4.12 The Tender Processing Committee shall first evaluate the technical proposals

4.13 The Tender Processing Committee appointed by the Client shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria notwithstanding any other requirement in the tender documents.

## **SECTION VI - TECHNICAL & FINANCIAL EVALUATION**

### **6.1 TECHNICAL EVALUATION**

#### **Notes on the preparation of the Technical Proposals**

6.1.1 In preparing the technical proposals the Tenderer is expected to examine all terms and information included in the RFP. ***Failure to provide all requested information shall be at the Tenderers own risk and may result in rejection of the Tenderer's proposal.***

6.1.2 The technical proposal shall provide all required information and any necessary additional information and shall be prepared using the standard forms provided in this Section.

The Technical proposal shall **not** include any financial information unless it is allowed in the Appendix to information to the Tenderers or the Special Conditions of contract

### **6.2 EVALUATION CRITERIA**

The bidders that will qualify at the mandatory evaluation stage shall be subjected to the technical evaluation criteria. The maximum scores attainable at the technical evaluation stage shall be eighty (80) out of eighty (80). Bidders who attain sixty (60) marks and above out of 80 shall qualify to proceed to the Financial Evaluation stage.

<b>No.</b>	<b>CRITERIA</b>	<b>REQUIREMENT</b>	<b>MAX SCOR E</b>	<b>SCOR E</b>
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1	<b>SPECIFIC EXPERIENCE</b>		<b>25</b>	
1.1	Specific experience of the Service Providers relevant to the assignment:	Provide evidence for at least two (2) projects within the last 5 years (Attach at least two (2) letter of recommendation from organizations stated above.	25	
2	<b>UNDERSTANDING OF ToR</b>		<b>5</b>	
2.1	Bidders' comments and suggestions on the Terms of References/Schedule of Requirements	Relevance and incisiveness of the bidder's comments on the provided Terms of Reference/Requirements.	5	
3	<b>METHODOLOGY AND WORK APPROACH</b>		<b>25</b>	
3.1	Appropriateness of the proposed implementation framework and methodology and Work Approach	Provide details of the methodology and Work Approach	20	
3.2	Appropriateness of the proposed project management framework including a project schedule covering project length etc.	Provide pragmatic project management implementation framework.	5	
4	<b>PERSONNEL EXPERIENCE</b>		20	

4.1	<p><b>Team Leader:</b> Should be a competent and qualified individual possessing demonstrable knowledge. Experience of at least 5 years in carrying out similar assignments</p> <p>He/ she should have at least 5 years' experience as team leader.</p>	CV of Team leader with 10 years' experience in the field and 5 years' experience as team leader (signed and dated within the RFP period by the team leader as confirmation of availability during project term).	5	
4.2	Other key staff: Individuals that have requisite qualifications with at least five years' experience in similar assignments	CVs of staff with five years' experience (signed and dated within the RFP period by the respective staff).	5	
4.3	Other key staff: Individuals that have requisite qualifications in related project management.	CV of staff with qualifications in project management and experience in relation to the subject matter (signed and dated within the RFP period by the respective staff).	5	
4.4	Overall composition and structure of the team, including allocation of tasks and its adequacy and relevance in meeting the TORs. Teams with individuals that are employees of the consultancy firm(s) are preferred.	Provide staff allocation of tasks in line with TORs.	5	
5	<b>FINANCIAL CAPABILITY</b>		<b>5</b>	

5.1	Gross Annual Turnover	(Provide audited account for the last three years (2019, 2020 and 2021).		
	<b>GRAND TOTAL</b>		<b>80</b>	

To be eligible to proceed to the next evaluation stage, bidders must score at least sixty (60) out of eighty (80) at the technical evaluation stage.

## **EVALUATION CRITERIA SCORES**

### **MANDATORY REQUIREMENTS**

<b>NO</b>	<b>MANDATORY REQUIREMENTS</b>	<b>PASS/FAIL</b>
1	Duly Filled confidential business form	
2	Attach a copy of a valid Certificate of business incorporation/registration	
3	Attach a copy of a valid Tax Compliance Certificate	
4	Attach a copy of a valid TIN certificate	
5	Project team and professional role / task for the (6) key members of the team with a bridged curriculum vitae, i.e. qualifications, expertise and experience. (Attach copy of certificates)	
6	Demonstration of financial capability in carrying out the required services by attaching certified copies of the firm's audited accounts for the last three year (2019, 2020 and 2021)	
7	Tender security of 2% of the quoted price.	
<b>Remarks</b>		

### 6.3. FINANCIAL EVALUATION (20 marks)

#### 6.3.1 Financial Evaluation and Scores

The financial proposals of the bidders that qualify at the technical evaluation stage shall be opened and evaluated.

Bidders are also expected to indicate their proposed payment schedule in line with their proposed work schedule in the format below. The Authority is not bound by a bidder's proposed payment schedule but the proposal will form part of the contract negotiations with the winning bidder.

However, where a Bidder has not proposed a payment schedule, the Bank will ensure the bidder is paid at the conclusion of the contract and the same shall not be negotiable.

The payment schedule shall be provided in the following format;

No.	Work Description	Percentage of Tender Sum	Amount (TZS)
	<b>Total</b>	<b>100%</b>	

At the Financial Evaluation stage, the following formulae shall be applied to derive the financial.

The committee shall thereafter compute the financial scores out of 20 points using the following formulae:-

$$\frac{\text{Lowest evaluated bid}}{\text{Financial Scores Bid Price}} \times 20 =$$

The technical and financial scores will be combined and the firm achieving the **HIGHEST COMBINED SCORES** will be considered for award of the tender.

**NB:** The financial proposals for both local and international firms must include all applicable taxes. The taxes currently applicable to consultancies are:

- Withholding Taxes- There is an applicable withholding tax rate on consultancy.

- Value Added Tax (VAT) – The VAT is loaded up to the consultancy cost and the applicable rate currently is 18% of the cost. This is applicable to all the firms and must be included and shown in the financial proposal.

### **Local Preference**

*While comparing price proposal between local and foreign firms participating in a selection process in financial evaluations, firms incorporated in Tanzania where indigenous own 51% or more of the share capital shall be allowed a 20% preferential bias in proposed prices. However, there shall be no such preference in the technical evaluation of the tenders. Proof of local incorporation and citizenship shall be required before the provisions of this sub-clause are applied. The bidders in the financial bid shall attach details of such proof.*

### **6.6.2. Total Bid Score**

A Bidder's final scores will be the addition of a Bidder's technical evaluation scores and the bidder's financial evaluation scores.

Bidder's Total Scores = Bidder's Technical Scores + Bidder's Financial Scores

### **6.6.3. Award Criteria:**

The tenderer with the highest combined technical and financial scores shall be awarded the contract.



**SECTION VII- STANDARD FORMS**

**7.1. FINANCIAL PROPOSAL SUBMISSION FORM**

\_\_\_\_\_ [Date]

To: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*[Name and address of Client]*

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for **CALL CENTRE WITH CUSTOMER RELATIONSHIP MANAGEMENT (CRM) CAPABILITIES** in accordance with your Request for Proposal No. ABL/PROC/CC/RFP/02/2022 and our Proposal. Our attached Financial Proposal is a proposed as below. *[Rate in words and figures]* inclusive of the taxes.

We remain,

Yours sincerely,

\_\_\_\_\_ *[Authorized Signature]*

\_\_\_\_\_ *[Name and Title of Signatory]:*

\_\_\_\_\_ *[Name of Firm]*

\_\_\_\_\_ *[Address]*

## 7.2. TECHNICAL PROPOSAL SUBMISSION FORM

[\_\_\_\_\_Date]

To:\_\_\_\_\_ [Name and address of Client]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services in accordance with your Request for Proposal No. ABL/PROC/CRM/RFP/02/2022 and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal.

We understand you are not bound to accept any Proposal that you receive.

We remain,

Yours sincerely,

\_\_\_\_\_ [Authorized Signature]:

\_\_\_\_\_ [Name and Title of Signatory]

\_\_\_\_\_ [Name of Firm]

\_\_\_\_\_ [Address:]

### 7.3. BIDDER'S EXPERIENCE

Give information on three (3) assignments in provision consultancy services for this assignment that the firm was legally contracted to undertaken in the recent past either individually as a corporate entity or in association with others.

#### Assignment 1

	Bidder's response
Name of Client Firm	
Client Contacts	
Nature of Task	
Duration	
Output of the task	
Status of the task (complete/ongoing/deferred)	

Repeat the above for assignment 2 & 3.

We understand that by submitting these firms, we have no reservation to the Bank contacting any of the firms for confidential information related to our performance in the said assignment.

Yours sincerely,

\_\_\_\_\_ *[Authorized Signature]*

\_\_\_\_\_ *[Name and Title of Signatory]:*

\_\_\_\_\_ *[Name of Firm]*

\_\_\_\_\_ *[Address]*

**7.4. FORMAT OF CURRICULUM VITAE (CV) AND TESTIMONIALS FOR**

**THE PROPOSED PROFESSIONAL STAFF DETAILS OF STAFF 1:**

Proposed Role: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Experience (Yrs): \_\_\_\_\_

Years with Firm: \_\_\_\_\_

Nationality: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

Detailed Tasks Assigned: \_\_\_\_\_

**Key Qualifications:**

*[Give an outline of the staff's experience and training pertaining to this assignment. Describe degree of responsibility held by this staff on previous assignments related to this assignment and give dates and locations of the assignment].*

**Education:**

*[Summarize college/university and other specialized education of this staff, giving names of college, dates attended and degree[s] obtained.]*

**Employment Record:**

*[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments.]*

**Certification:**

I, the undersigned, certify that these data correctly describe me, my qualifications, and my experience.

*[Name]* \_\_\_\_\_

*[Signature of staff member]* \_\_\_\_\_

*[Date]* \_\_\_\_\_

---

*[Name of authorized representative of the firm]* \_\_\_\_\_

*[Signature of authorized representative of the firm]* \_\_\_\_\_

*[Date]* \_\_\_\_\_

*Repeat the same for staff 2 &*

**7.5. FINANCIAL PROPOSAL STRUCTURE**

<b>No</b>	<b>Milestone</b>	<b>Cost (Tshs.)</b>
1.		
2.		
3. etc.		
<b>Sub Total</b>		
<b>Taxes</b>		
<b>Total Amount of Financial Proposal</b>		

**7.6. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT**

---

**7.7. FORMAT OF TENDER SECURITY INSTRUMENT**

Whereas ..... [Name of the tenderer] (hereinafter called “the tenderer”) has submitted its tender dated ..... [Date of submission of tender] for the ..... [Name and/or description of the tender] (hereinafter called “the Tender”)

KNOW ALL PEOPLE by these presents that WE ..... [Name of Insurance Company] having our registered office at ..... (hereinafter called “the Guarantor”), are bound unto AZANIA BANK LIMITED (hereinafter called “the Procuring Entity”) in the sum of ..... for which payment well and truly to be made to the said Procuring Entity, the Guarantor binds itself, its successors, and assigns by these presents.

Sealed with the Common Seal of the said Guarantor this \_\_\_\_ day of \_\_\_\_\_ 20\_\_.

THE CONDITIONS of this obligation are:

- 1. If after tender opening the tenderer withdraws his tender during the period of tender validity specified in the instructions to tenderers, Or
- 2. If the tenderer, having been notified of the acceptance of his tender by the Employer during the period of tender validity:
  - (a) fails or refuses to execute the form of Agreement in accordance with the Instructions to Tenderers, if required; or
  - (b) fails or refuses to furnish the Performance Security, in accordance with the Instructions to Tenderers;

We undertake to pay to ABL up to the above amount upon receipt of its first written demand, without ABL having to substantiate its demand, provided that in its demand ABL will note that the amount claimed by it is due to it, owing to the occurrence of one or both of the two conditions, specifying the occurred condition or conditions.

This guarantee will remain in force up to and including thirty (30) days after the period of tender validity, and any demand in respect thereof should reach the Guarantor not later than the said date.

\_\_\_\_\_  
[Date]

\_\_\_\_\_  
[Signature of the Guarantor]

[Witness] \_\_\_\_\_

\_\_\_\_\_  
[Seal]



## 7.8. CONFIDENTIAL BUSINESS QUESTIONNAIRE

You are requested to give the particulars indicated in Part 1 and either Part 2 (a), 2(b) or 2(c) whichever applied to your type of business.

<p>You are advised that it is a serious offence to give false information</p> <p>on this form. Part 1 General</p> <p>Business Name .....</p> <p>Location of Business Premises .....</p> <p>Plot No,.....Street/Road.....</p> <p>Postal address .....Tel No. ....</p> <p>Fax ..... Email .....</p> <p>Nature of Business .....</p> <p>Registration Certificate No. ....</p> <p>Maximum value of business which you can handle at any one time – Tshs. ....</p> <p>Name of your bankers .....</p> <p>Branch .....</p>																									
	<p>Part 2 (a) – Sole Proprietor Your name in full.....Age.....</p> <p>Nationality.....Country of Origin.....</p> <p>Citizenship details .....</p>																								
	<p>Part 2 (b) – Partnership</p> <p>Given details of partners as follows</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 30%;">Name</th> <th style="width: 20%;">Nationality</th> <th style="width: 40%;">Citizenship details</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;">Shares</td> <td></td> <td></td> </tr> <tr> <td>1.</td> <td>.....</td> <td></td> <td></td> </tr> <tr> <td>2.</td> <td>.....</td> <td></td> <td></td> </tr> <tr> <td>3.</td> <td>.....</td> <td></td> <td></td> </tr> <tr> <td>4.</td> <td>.....</td> <td></td> <td></td> </tr> </tbody> </table>		Name	Nationality	Citizenship details		Shares			1.	.....			2.	.....			3.	.....			4.	.....		
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1.	.....																								
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4.	.....																								
	<p>Part 2 (c) – Registered Company</p> <p>Private or Public</p> <p>State the nominal and issued capital of company Nominal Tshs.</p> <p>Issued Tshs.</p> <p>Given details of all directors as follows</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 30%;">Name</th> <th style="width: 20%;">Nationality</th> <th style="width: 40%;">Citizenship details</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;">Shares</td> <td></td> <td></td> </tr> <tr> <td>1.</td> <td>.....</td> <td></td> <td></td> </tr> <tr> <td>2.</td> <td>.....</td> <td></td> <td></td> </tr> <tr> <td>3.</td> <td>.....</td> <td></td> <td></td> </tr> <tr> <td>4.</td> <td>.....</td> <td></td> <td></td> </tr> </tbody> </table>		Name	Nationality	Citizenship details		Shares			1.	.....			2.	.....			3.	.....			4.	.....		
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	<p>Date.....Signature of Candidate.....</p>																								

**7.9. FIRM'S REFERENCES**

**Relevant Services Carried Out in the Last Five Years That Best Illustrate Qualifications**

Using the format below, provide information on each assignment for which your firm either individually, as a corporate entity or in association, was legally contracted.

Assignment Name:		Country
Location within Country:		Professional Staff provided by Your Firm/Entity(profiles):
Name of Client:		Clients contact person for the assignment.
Address:		No of Staff-Months; Duration of Assignment:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Services (Tshs)
Name of Associated Consultants. If any:		No of Months of Professional Staff provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Narrative Description of the nature of the assignment, the role of the firm in the planning, implementation and closing of the assignment:		
Description of Actual Services Provided by Your Staff:		

Firm's Name: \_\_\_\_\_  
 Name and title of signatory; \_\_\_\_\_

*(May be amended as necessary)*