

REQUEST FOR PROPOSAL

BID NUMBER: ECIC09P-2026/27

PROVISION OF MICROSOFT LICENSES INCLUDING SHAREPOINT STORAGE AND SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

CLOSING DATE: 15 DECEMBER 2026

CLOSING TIME: 11H00 (SAST, OBTAINABLE BY DIALLING TELKOM ON 1026)

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Company registration no: 2001/013128/30 | ECIC is a licensed non-life insurer and authorised Financial Services Provider (FSP 30656). Currently exempted in terms of FAIS Notice 78 of 2019.
*alternate to Mr. W van Der Spuy
YOUR EXPORT RISK PARTNER

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A. INTRODUCTION TO THE REQUEST FOR PROPOSAL (RFP)

1. Introduction

1.1. The Export Credit Insurance Corporation of South Africa (SOC) Limited[1] (ECIC or Corporation) is a self-sustained state-owned entity listed under Schedule 3B of the Public Finance Management Act 1 of 1999 (as amended) and established in terms of the Export Credit and Foreign Investments Insurance Act 78 of 1957 (as amended).

1.2. The mandate of ECIC is to facilitate and encourage South African export trade, by underwriting export credit loans and investments outside the country, to enable South African contractors to win capital goods and services contracts in countries outside South Africa. ECIC is a registered Financial Service Provider and is regulated by the Financial Sector Conduct Authority and Prudential Authority (FSP No: 30656). Currently exempted in terms of FAIS Notice 78 of 2019.

1.3. ECIC operates at the following address:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

2. Purpose

2.1. The purpose of this Request for Proposal (RFP) is to appoint a service provider to supply Microsoft™ licenses, support and maintain the ECIC ERP solution and provide professional services across Microsoft technologies for a period of three years, including enhancements of the current solutions, providing technical support, configuring new services and advisory as and when required.

3. Disclaimer: Trademarks, brand names and equivalent products

3.1. All third-party trademarks, trade names and product names referenced in this tender document belong to their respective owners. Their inclusion is for identification or specification purposes and does not imply affiliation, sponsorship or endorsement. This document grants no licence or ownership rights in those trademarks.

3.2. Where a trademark, brand name, model number or manufacturer is referenced as a benchmark for the required goods or services, that reference must be read as including "or equivalent". Bidders may offer alternatives that meet or exceed the minimum functional, technical, performance and compatibility requirements expressly stated in this tender.

3.3. Bidders offering alternatives must clearly identify them and submit supporting technical documentation with their bids demonstrating equivalence. Equivalence will be assessed against the requirements and evaluation criteria published in this tender document.

[1] Further information on the ECIC can be found at www.ecic.co.za

4. Background

4.1. ECIC follows a hybrid ICT sourcing model, combining internal capacity with outsourced specialist expertise. Internal staff handle most Tier 1 support, while matters requiring Tier 2 or higher expertise are referred to external service providers.

4.2. The ECIC is currently using a cloud-based ERP Solution, namely Microsoft Dynamics 365 (D365), for financial and procurement management. The ERP solution was extended using the Power Platform to provide additional functionality such as Tender and Contract Management.

4.3. It is worth noting that in addition to D365, the ECIC is also using the Microsoft 365 platform, including Exchange Online (eMail), SharePoint (Intranet), OneDrive, MS Teams (Video Conferencing), Office 365 (Productivity), Power Platform (PowerApps and Power Automate) and Power BI, which is currently implemented in silos.

4.4. The ECIC intends to adopt a universal Business Intelligence and Data Analytics Platform based on Microsoft Power BI. Currently, business units such as Human Resources, Investment and Finance have Power BI capabilities implemented in silos within their respective systems without considering dashboarding access requirements across the organisation. As a result, the ECIC wants to conduct a BI and Data Analytics readiness assessment by sampling Business Units with structured data from automated systems and those that heavily rely on unstructured data (MS Excel and MS Word with SharePoint as the main storage) to determine the best approach in line with best practices and licensing efficiency for ECIC to implement a universal BI and Data Analytics Platform.

4.5. The ECIC also want to introduce COPILOT in the organisation in a manner that will provide the best value to the organisation while reducing risks. As such, the successful bidder should be able to provide best practice advice.

4.6. The ECIC operates in a hybrid environment comprising a private cloud hosted by an external service provider, which consists of five (5) Windows 2022 servers and one out-of-support Windows server planned for decommissioning. In the private cloud, there is SQL Server 2022 and Local Active Directory which integrates with Azure AD. Except for one line-of-business system that runs in the private cloud, the rest of the business systems are based on a SaaS model, with most systems having single sign-on. The core business and stakeholder engagement platforms are currently manual, with efforts underway to implement a CRM system by 2027 and an Insurance Management System; these two new systems will require the ability to provide Power BI dashboards.

4.7. ECIC subscribes to the Corporate Governance of ICT Policy Framework, COBIT2019 and ISO27001:2022 as guidelines for the implementation of ICT Governance and Information Security Management within the Corporation, which is supported by the ISO27001:2022 (ISO27001) and COBIT2019 assessments conducted every two years to determine the capability maturity level of the Corporation which together with audits may from time to time inform enhancements and controls to be implemented.

4.8. As a financial institution, in addition to laws and prescripts such as POPIA that the ECIC must comply with, there are joint standards from the Prudential Authority (PA) that the ECIC technology environment and outsourced services must comply with.

4.9. The current ECIC contract for the provision of Microsoft licenses, support and maintenance of the ERP ends on 28 February 2027; as a result, the ECIC intends to enter into a new agreement and ensure a smooth transition from the current agreement to the new one with no adverse business impact. The current agreement comprises the following Microsoft licenses and services:

Table 1

ITEM	CURRENT QUANTITY
Microsoft 365 E3	120
Exchange Online (Plan 2)	5
Power BI Pro	10
Power Apps per user plan	10
Power Apps per app plan	20
Power Apps Portal login capacity add-on	2
SharePoint storage add-on	4TB
Dynamics 365 Finance	30
Dynamics 365 Operations	55
Dynamics 365 Team Members	1
MS Teams premium add-on license	5
Copilot Pro	-
MS Visio	3
MS Projects	2

4.10. The new agreement must ensure that a minimum of 120 Microsoft E3 licenses are active and usable by 1 March 2027.The agreement must further provide for the scalable provisioning of additional licences, as and when required by ECIC during the contract period, in accordance with the pricing and quantities provided for in the scope. This approach will enable ECIC to accommodate organisational growth without procuring and paying for licences before they are required, while avoiding the need for a contract variation for licence increases already contemplated within the scope.

5. Procurement Regulations

5.1. This bid is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2022, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of contract conflict with the general conditions of contract, the special conditions of contract prevail.

B. TERMS OF REFERENCE

6. Scope of services

6.1. The appointed bidder will be required to:

6.1.1. **Provide Microsoft 365 E3 Licensing for a period of three years, billable annually as follows:**

Table 2

ITEM	QUANTITY / SIZE
Microsoft 365 E3 ***130 of the proposed 160 loaded by 1 March 2027. Additional licenses need to be loaded and billed as and when required.***	160
Initial licenses required by 1 March 2027	130
Additional licenses	**As and when required during the contract period, at the contracted unit rate**
Exchange Online (Plan 2)	5
Power BI Pro **Annual review to be conducted within the duration of the determined adjustments (increases/ changes)**	10
Power Apps per user plan	10
Power Apps per app plan	20
Power Apps Portal login capacity add-on	2
MS Teams Premium	6
COPILOT PRO **Annual review to be conducted within the duration of the determined adjustments (increases)**	50 Year 1
MS Visio	4
MS Project	2
SharePoint storage add-on ***4TB activated by 1 March 2027. Additional 2TB billable once required during the contract. Additional storage will be activated once required.***	Up to 6TB

6.1.2. **Provide ERP Solution (Microsoft Dynamics 365) Licensing for a period of three (3) years as on an annual commitment, billable annually as follows:**

Table 3

ITEM	QUANTITY
Dynamics 365 Finance	30
Dynamics 365 Operations	55
Dynamics 365 Team Members	1

6.1.3. Provide ERP Solution (Microsoft Dynamics 365) support and maintenance for a period of three (3) years, structured as follows:

6.1.3.1. **25-hour** retainer of support and maintenance for the ERP solution per month for the duration of the contract. Carry over unused monthly hours and/or use them to implement enhancements.

6.1.3.2. Fixed cost for the support and maintenance of the ERP solution for the duration of the contract.

6.1.4. Provide enhancement services on the ERP Solution (Microsoft Dynamics 365) as and when required, structured as follows:

6.1.4.1. Implement additional requirements (enhancements) on the ERP system as and when required. Provide **480** annual billable hours on a time-and-materials basis as and when the ECIC requires new functionality to be implemented based on tools within the Microsoft product suite.

6.1.4.2. Pre-scoping (includes functional requirements and functional design), costing and approval for all enhancements before implementation.

6.1.5. Provide Business Intelligence and Data Analytics professional services including:

6.1.5.1. Power BI and Data Analytics readiness assessments. The initial one-off readiness assessment aimed at ensuring the organisation adopts Power BI most efficiently, securely, aligned to best practice and cost-effectively must focus on at least Finance, SCM, Investment Management, Human Resources, Business Development, Underwriting (Short-term and Middle to Long-term insurance), Portfolio Management, Risk and Compliance.

6.1.5.2. Provide BI and Data Analytics licenses and best practice advisory services.

6.1.5.3. Implement a universal BI and Analytics platform as part of the Microsoft 365 Platform support and maintenance hours, which are separate from ERP support and maintenance hours.

6.1.6. Provide an annual allocation of **360** support and maintenance hours for the Microsoft product suite (separate from ERP support hours) billable on a time-and-materials basis for advisory, technical support and implementation/ configuration. The hours may be utilised towards any of the following:

6.1.6.1. Commissioning the Power BI platform following the outcome of a BI and Data Analytics readiness assessment.

6.1.6.2. Providing AI (COPILOT) best practice advisory and related Microsoft Intelligent Data Platform as and when required.

6.1.6.3. Providing advisory, implementation and technical support for the Microsoft Cloud and infrastructure platform including monthly health checks and reporting for in-scope services.

6.1.7. **Training and skills transfer**

6.1.7.1. Provide a skills transfer and knowledge sharing plan outlining how the ECIC ICT personnel (up to 10 personnel) will be equipped with practical skills and knowledge to perform basic support of the various Microsoft solutions in scope for the tender. The skills transfer will include at least configuration, best practice advice, and technical support-related aspects.

6.1.7.2. Provide training manuals or access to an online training platform (Training is not formal certification training. Formal certification training will be arranged through ECIC internal processes).

6.1.8. **Documentation and reporting:**

6.1.8.1. Provide project documents such as statement of work, design/ architecture, data flow diagrams, design documents and configuration documents.

6.1.8.2. Provide monthly SLA reports for live Microsoft systems/ tools which may include capacity, availability, issues, risk and status of logged support tickets.

6.1.8.3. Attend monthly SLA meetings.

6.1.8.4. Provide project status report (for example, during implementation of a specific enhancement, the project team(s) may meet weekly).

6.1.9. **Bidder's team capacity**

6.1.9.1. Provide a suitably skilled and experienced team geared for continuity, efficiency and compliance; the bidder's team should at least cater for:

6.1.9.1.1. Two developers experienced in Power Apps and D365.

6.1.9.1.2. One Project Lead/ Manager

6.1.9.1.3. Two functional consultants on D365 to reduce dependency on one person, which may hinder the pace of D365 implementation of enhancements.

6.1.9.1.4. Two support team members (with experience in Microsoft Cloud and Infrastructure Platform, including SQL and Windows Server)

6.1.9.1.5. Two Power BI resources.

6.1.9.1.6. Developers' access segregated from live environment.

7. Service Level Agreement

7.1. The successful bidder must have adequate team capacity to provide continuous support to the ECIC. The support structure must ensure business continuity by avoiding dependency on a single resource and maintaining sufficient backup capabilities. The bidder shall provide security-related proactive and reactive support services throughout the contract period.

7.2. The ECIC-authorised ICT personnel must have access to the different tools/systems to be provided and supported by the appointed bidder. The access is for pulling ad hoc reports and performing basic support functions.

7.3. Any subscription that may be provided by the bidder during the contract must be registered in ECIC's name with the OEM. However, the bidder must be able to log support calls directly with the OEM on behalf of ECIC as and when required.

7.4. ECIC may decide to upgrade the licenses from E3 to E5 during the course of the contract and request the appointed bidder to adjust the licenses and associated costs accordingly.

7.5. Dynamics 365 licenses must be on an annual commitment to enable the ECIC to make system investment changes, such as changing its ERP system should it decide to do so within the 3 years.

7.6. The appointed bidder must be able to increase license count in line with the scope of work as the ECIC business grows. The licenses must be made available within 5 business days from the date an official written instruction is sent to the appointed bidder.

7.7. The bidder must provide an established technical support process with an electronic helpdesk system and a defined Service Level Agreement (SLA) matrix for attending to and resolving queries. The bidder will need to align their SLA matrix with the commitment and measurement of the matrix below. to provide consistent service, support and delivery:

7.7.1. Target Time to Action (TTA): The maximum allowable time to acknowledge a ticket and begin active work or intervention on the query logged.

7.7.2. Mean Time to Resolution/Repair (MTTR): Measures the average time it takes to resolve an incident once it's been identified.

7.7.3. Severity and Priority:

7.7.3.1. **Severity 1:** Outage or unavailability of service or functionality affecting business continuity.

7.7.3.2. **Severity 2:** Major disruptions to a significant business service or system but isn't as devastating as a severity 1.

7.7.3.3. **Severity 3:** Moderate effect on ECIC operations; usually affecting non-critical functionalities within core systems, however, significantly hinders business productivity.

7.7.3.4. **Severity 4:** Represents a low-priority issue that causes minimal or no disruption to normal service

Table 4

Severity Levels	Target Time to Action (TTA)	Meantime to Resolution (MTTR)
Severity 1	15 minutes	2 hours
Severity 2	30 minutes	4 hours
Severity 3	1 hour	8 hours
Severity 4	4 hours	24 hours

Notes:

- A detailed SLA will be discussed and agreed on during the contractual stage.
- ECIC acknowledges that in certain instances the MTTR will be best effort until resolution, with hourly progress updates for major incidents where OEM / bidder third-party SLA dependency applies.
- Telephone and email availability - 24x7x365 (to cater for emergencies).
- Security Event Monitoring - 24x7x365.

7.7.4. To enable the ECIC to meet its business resilience requirements and regulatory compliance requirements. The master service agreement/ SLA must cater for:

7.7.4.1. The ECIC and relevant regulators (such as the Prudential Authority) have the right to audit the successful bidder's processes in relation to services provided to the ECIC.

7.7.4.2. The bidder will be expected to complete a third-party risk assessment at least once annually and provide the required evidence, which may include SOC2/ISAE assurance reports.

7.7.4.3. Liability in the event of a major data breach/ cyber incident as a result of negligence or failure to comply with relevant laws and prescribed by the successful bidder.

7.7.4.4. The successful bidder will be expected to provide the ECIC with its business continuity plan.

7.7.4.5. The ECIC must be informed by the bidder when the OEM(s) experience a major cyber incident/ data breach or when there are changes in data centre locations that could affect compliance with applicable privacy laws.

8. Delivery address

8.1. The implementation and support can be provided remotely; however, where necessary, a representative of the service provider may be required to be at the ECIC office:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

9. Bid/contract conditions

9.1. The following conditions of contract apply to this bid:

9.1.1. **Bidder accreditations:**

The recommended must be registered as a Microsoft™ Partner for Dynamics and Power BI. Bidders are required to provide proof of registration/accreditation with Microsoft™, which may include categories such as Business Applications/ Analytics and BI/ AI Cloud Partner/ Modern Workspace / Dynamics or equivalent. ECIC will verify the accreditation from the Microsoft Partner portal. If a bidder did not submit the proof of registration/accreditation with Microsoft, ECIC will attempt to verify the registration/accreditation details using the name of the bidder on the Microsoft Partner portal. **Proof from distributors will not be accepted.**

9.1.2. ECIC will not evaluate any bid received from a bidder that does not meet the full requirements as stipulated under the scope of services in paragraph 6.

9.1.3. The successful bidder must sign a confidentiality undertaking as part of the service level agreement.

9.1.4. The agreement may be terminated by the ECIC if it has reasonable grounds to do so, with not less than 90 days' prior written notice. A termination clause will form part of the agreement and may include events such as unsatisfactory performance, defining events, departure of key personnel, governance and ownership issues and reputational risks.

10. Due diligence/site inspection

10.1. At the ECIC's discretion, a due diligence and/or site inspection may be conducted on the identified bidder. ECIC will visit the identified bidders' premises or bidder's client (with permission from the bidder) with the objective of verifying information as contained in their respective bid documents.

10.2. Where applicable, the ECIC will issue criteria for the due diligence review or site inspection beforehand to the applicable bidder(s). Should it be discovered during a due diligence visit or site inspection that the information submitted by the identified bidder is inconsistent with what is on their current premises of business, ECIC reserves the right to disqualify such bidder.

10.3. ECIC may identify another bidder using the next highest points obtained in the evaluation phase as stipulated in paragraph 11.1.3, taking into consideration the process followed under paragraphs 10.1 and 10.2.

11. Bid evaluation

11.1. The proposals will be evaluated in phases as highlighted below and detailed in paragraphs 11.1.1 to 11.1.4 of this document:

11.1.1. **Phase One: Pre-qualification**

11.1.1.1. Microsoft™ Partner for Dynamics and Power BI. Bidders are required to provide proof of registration/accreditation with Microsoft™, which may include categories such as Business Applications/ Analytics and BI/ AI Cloud Partner/ Modern Workspace / Dynamics or equivalent. ECIC will verify the accreditation from the Microsoft Partner portal. If a bidder did not submit the proof of registration/accreditation with Microsoft, ECIC will attempt to verify the registration/accreditation details using the name of the bidder on the Microsoft Partner portal. **Proof from distributors will not be accepted.**

11.1.1.2. Where a bidder fails to meet the requirements as listed in paragraph 11.1.1.1, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

11.1.2. **Phase Two: Functional evaluation**

In this evaluation phase, bidders are expected to obtain a minimum of 75 out of 100 points to proceed to the next evaluation stage of the evaluation. Regardless of whether the overall minimum score of 75 is achieved, bidders must also achieve the minimum threshold as indicated in paragraph 12.4. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation phase.

11.1.3. **Phase Three: Preference Point System**

The 80/20 preference point system shall be applicable to this phase, where 80 points represent maximum obtainable points for the lowest acceptable bid and 20 points represents maximum obtainable points for Specific Goals. Points will be awarded to a bidder for attaining the Specific Goals in accordance with the table as listed in the bid documentation (refer to paragraph 13, read together with the table in **page 41 (paragraph 4.1)**.

11.1.4. **Evaluation Phase Four: Objective criteria**

ECIC will apply objective criteria as detailed in paragraph 15.

12. Evaluation Phase Two: Functional

12.1. The proposal submitted by the bidder will be evaluated by the ECIC based on the following criteria and be rated as the factor score multiplied by the applicable points:

Factor scores: 0=Poor, 1=Below average, 2=Average, 3=Good, 4=Very Good, 5=Excellent

Table 5

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
1. Contactable reference letters	**1.1. Implementation and/or support of Dynamics 365 (ERP – Finance and SCM)** The bidder must provide contactable references (list/ letters) where similar services were provided. Reference/project delivery date must not be older than 5 years from the closing date of this bid. References must clearly include the type of service provided, the date when the project was delivered and the name of the referee. **If reference letters are provided, they must be on company letterhead; otherwise, reference letters will be a condition of award where a list not supported by letters was provided.**	1.1.1. No references provided.	0	25	**35**
		1.1.2. One contactable reference provided.	1		
		1.1.3. Two contactable references provided.	2		
		1.1.4. Three contactable references provided.	3		
		1.1.5. Four contactable references provided.	4		
		1.1.6. At least five contactable references provided.	5		
	1.2. **Implementation and/or support of Power BI and/or Microsoft environment.** The bidder must provide contactable references (list/ letters) where similar services were provided. Reference/project delivery date must not be older than 5 years from the closing date of this bid. References must clearly include the type of service	1.2.1. No references provided.	0	10	
		1.2.2. One contactable reference provided.	1		
		1.2.3. Two contactable references provided.	2		

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
	provided, the date when the project was delivered and the name of the referee. **If reference letters are provided, they must be on company letterhead; otherwise, reference letters will be a condition of award where a list not supported by letters was provided.**	1.2.4. Three contactable references provided.	3		
		1.2.5. Four contactable references provided.	4		
		1.2.6. At least five contactable references provided.	5		
2. Approach and methodology	2.1. Provide a clear methodology or approach which covers the following in-scope areas: a) Support and maintenance of the ERP solution (Microsoft Dynamics 365 with additional modules built on the Power Platform) – Both the support portion on retainer and enhancements on time and materials as per scope of work. b) Support and maintenance of the Microsoft 365 Platform (Microsoft 365, Active Directory (Azure AD and Local AD), SQL Server, Windows Server 2022 and Microsoft productivity tools and collaboration tools) based on time and materials as per the scope of work.	2.1.1. No approach and methodology provided.	0	20	**20**
		2.1.2. Vague or incomplete approach and methodology provided do not address all the items in (a) to (e).	1 - 2		
		2.1.3. The approach and methodology provided adequately address all items (a) to (e).	3		

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
	c) Provide a clear methodology or approach for the BI and Analytics readiness assessment and phased implementation to standardise on a universal Power BI platform. d) Current size of the bidder's team (support personnel vs implementation/ development personnel) and how the bidder will meet the ECIC requirement in consideration of the bidder's current contractual obligations with other clients. e) Confirmation of how the bidder will approach knowledge transfer to the ECIC team to ensure ECIC has the capacity for first-line support and reduce overly dependency on the bidder.	2.1.4. Meets the rating of 3 and provides additional information such as governance arrangements and the standards, best practices and frameworks the bidder subscribes to.	4 - 5		
3. Bidder's team experience	**Team Lead / Project Manager** 3.1. The bidder's Team Lead/ Project Manager must have a minimum of 5 years of relevant experience managing ICT projects with experience in Microsoft Dynamics 365 implementation and support. The experience may include managing software development teams, release management and support teams delivering services to clients.	3.1.1. Either the CV or copies of relevant qualifications are not provided.	0	10	**30**
		3.1.2. The CV is vague, though 5 years' experience is indicated; qualifications are provided.	1 - 2		
		3.1.3. The CV is detailed and clearly indicates the Team Lead's relevant work experience and qualifications provided. The Team Lead has 5 years of relevant work experience.	3		

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
	CVs and copies of certifications/qualifications must be attached. Failure to attach either a CV or minimum required certifications/qualifications will score a zero (0) • Project Management qualification/ certification	3.1.4. The CV is detailed and clearly indicates the Team Lead's relevant work experience and qualifications provided. The Team Lead has over 5 years to 8 years of relevant work experience.	4		
		3.1.5. The CV is detailed and clearly indicates the Team Lead's relevant work experience and qualifications provided. The Team Lead has over 8 years of relevant work experience.	5		
	Bidders Team 3.2. **Dynamics 365 Team** - Provide CVs and certifications of the bidder's team. The bidder's team must have a minimum of 3 years of experience implementing Dynamics 365 and relevant qualifications / Microsoft Certifications (Dynamics 365 qualifications and/or Power Platform development or equivalent. Dynamics 365 Bidders Team includes at least: • 2 x Developers • 2 x functional consultants **CVs and copies of certifications/qualifications must be attached. Failure to attach either a CV**	3.2.1. No CVs provided and/or copies of qualifications provided.	0	10	
		3.2.2. Less than the minimum required team members with a minimum of 3 years' relevant Dynamics 365 experience and qualifications.	1 - 2		
		3.2.3. 2 team members with a minimum of relevant Dynamics 365 experience and qualifications.	3		
		3.2.4. 2 team members with over 3 years' to 7years relevant Dynamics 365 experience and qualifications.	3 - 4		

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
	or the minimum required certifications will score a zero (0).	3.2.5. More than 2 team members with over 7 years' relevant Dynamics 365 experience and qualifications.	5		
	Bidders Team 3.3. **Power BI Team** - Provide CVs and certifications of the bidder's team. The bidder's team must have a minimum of 3 years of experience implementing Dynamics 365 and relevant qualifications / Microsoft Certifications (Power BI qualifications and/or Data Analytics or equivalent). Dynamics 365 Bidders Team includes at least: • 2 x BI/Data consultants or equivalent, **CVs and copies of certifications/qualifications must be attached. Failure to attach either a CV or the minimum required certifications will score a zero (0).**	3.3.1. No CVs provided and/or copies of qualifications provided.	0	10	
		3.3.2. 1 team member with a minimum of 3 years' relevant Power BI / Data Analytics experience and qualifications.	1		
		3.3.3. 2 team members with 3 years' relevant Power BI / Analytics experience and qualifications.	2 - 3		
		3.3.4. 2 team members with over 3 years' relevant Power BI / Analytics experience and qualifications.	4		
		3.3.5. More than 2 team members with over 3 years' relevant Power BI / Analytics experience and qualifications.	5		
4. Security and compliance	4.1. Provide attestation in the proposal/letter or equivalent outlining:	4.1.1. No attestation provided.	0	15	**15**
		4.1.2. Attestation provided covers up to 2 items outlined in (a) to (d).	1 – 2		

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
	a) Bidder's business continuity arrangements in the event of loss of key resources, business operations or disruption to key processes. b) Bidder's approach and principles to ensure secure software development processes. c) Bidder's Alignment with ISO 27001, on which ECIC's ISMS is based. d) Compliance with POPIA.	4.1.3. Attestation provided covers up to 3 items outlined in (a) to (d).	3		
		4.1.4. Attestation provided is detailed and covers all items outlined in (a) to (d).	4 - 5		
Total					**100**

12.2. Total points achieved under this evaluation criteria will be rounded to the nearest two decimal places.

12.3. Bidders are expected to obtain a minimum of 75 out of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation phase.

12.4. Regardless of whether the overall minimum score of 75 is achieved, bidders must score the minimum threshold per evaluation criteria listed below:

12.4.1. 60% (3/5) for contactable references (Criteria 1.1);

12.4.2. 40% (2/5) for contactable references (Criteria 1.2);

12.4.3. 60% (3/5) approach and methodology (Criteria 2.1);

12.4.4. 60% (3/5) for Bidder's team experience (Criteria 3.1);

12.4.5. 60% (3/5) for Bidder's team experience (Criteria 3.2);

12.4.6. 60% (3/5) for Bidder's team experience (Criteria 3.3); and

12.4.7. 60% (3/5) Security and compliance (Criteria 4.1).

12.5. Failure to obtain the prescribed minimum points required under paragraph 12.4 will automatically disqualify the bid offer from proceeding to the next evaluation phase.

13. Phase Three: Preference point system

13.1. The formula below will be used to calculate the lowest acceptable bid price:

$$\mathbf{Ps} = \mathbf{80}\left(\mathbf{1} - \frac{\mathbf{Pt-Pmin}}{\mathbf{Pmin}}\right)$$

Where

Ps = Points scored for price of tender under consideration;
Pt = Comparative price of bid or offer under consideration; and
Pmin = Price of the lowest acceptable tender.

13.2. Depending on the bidder's level of Specific Goals, a maximum of 20 Specific Goals points may be awarded to a bidder. The points scored by a bidder for Specific Goals will be added to the points allocated for price.

13.3. The table below reflects the number of points to be allocated to a bidder for Specific Goals:

Table 6

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)
B-BBEE Procurement Recognition Level of 135% and at least 50.1% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	20
B-BBEE Procurement Recognition Level of at least 110% and at least 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	10
B-BBEE Procurement Recognition Level of at least 110% and up to 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	5
Any other B-BBEE Procurement Recognition Level up to 110%.	0

[BIDDERS ARE REQUIRED TO INDICATE, IN ONE BLOCK, THE NUMBER OF POINTS THEY ARE CLAIMING FOR SPECIFIC GOALS IN THE TABLE IN PAGE 41 (PARAGRAPH 4.1). IN THE EVENT WHERE A BIDDER MAKES A

MARK (ONE MARK), ECIC WILL CONSIDER THE CORRESPONDING POINTS TO BE THE ONE WHICH THE BIDDER IS CLAIMING FOR. WHERE A BIDDER MAKES MULTIPLE MARKS OR DOES NOT MAKE ANY MARK OR INDICATION AT ALL IN THE TABLE, THE BIDDER WILL BE ALLOCATED ZERO (0) POINTS FOR SPECIFIC GOALS, NOTWITHSTANDING EVIDENCE PROVIDED.]

13.4. The total points achieved under this evaluation criterion will be rounded to the nearest two decimal places.

14. Document(s) required to substantiate claims for Specific Goals

14.1. For this bid, bidders are requested to provide the following documents in substantiation for their claim of Specific Goals in line with the 2022 Preferential Procurement Regulations:

Table 7

Specific Goals	Document required to substantiate the Specific Goals claim
B-BBEE Procurement Recognition Level	Copy of a valid B-BBEE Certificate or Copy of a valid Sworn Affidavit

14.2. Any bid received from a bidder who did not provide the document requested in this paragraph 14 and do not indicate the number of Specific Goals they are claiming for in the SBD6.1 Form, **in the table on page 41 (paragraph 4.1)** shall be awarded zero points for Specific Goals (i.e. both the document required to substantiate the Specific Goals Claimed and the SBD6.1 must be submitted with the response to this bid).

14.3. Points for Specific Goals will be allocated as indicated in paragraph 13 of this RFP and in the SBD 6.1 Form. Bidders are required to indicate how they claim points for each preference point on the SBD6.1 Form, **in the table on page 41 (paragraph 4.1)**. In the event that a bidder does not indicate the preference points they are claiming, the bidder will be awarded zero (0) points for Specific Goals.

15. Phase Four: Objective criteria

15.1. In this evaluation stage, ECIC will check if the bidder has a person who meets the following criteria in awarding the bid:

15.1.1. The bidder has a significant shareholder or owner (or equivalent) (directly or indirectly) who is classified or can be classified as a Prominent Influential Person (PIP) in accordance with the Financial Intelligence Centre Act, 38 of 2001 (FICA).

15.1.2. The bidder has a shareholder or member or owner or director (or equivalent) who has questionable integrity status.

15.1.3. The bidder has a director or equivalent who is classified or can be classified as a PIP in accordance with FICA.

15.2. Should it be found during this evaluation stage that the bidder who has attained the highest points under Evaluation Stage Four (Preference Point System) has persons listed in paragraphs 15.1.1 to 15.1.3, ECIC reserves the right to conduct further due diligence on the person(s). Should the outcome of further due diligence not be satisfactory to ECIC, or if such a person(s) poses an unacceptable high risk reputation and/or integrity of the person(s) be questionable, ECIC reserves the right not to award the bid to that bidder. This process may be repeated for the next bidder if so required.

16. Standard bidding documents

16.1. Bidders are required to complete and attach the following Standard Bidding Documents:

Table 8

DETAILS	REFERENCE NUMBER
Invitation to bid	SBD 1
Declaration of Interest	SBD 4
Preference Points Claim Form for Preferential Procurement Regulations 2022 **Should a bidder not complete and sign the SBD6.1, the bidder will be allocated 0.00 points for Specific Goals.**	SBD 6.1

16.2. ECIC will not award a bid to a bidder who has not submitted complete and signed Standard Bidding Documents, and the Standard Bidding Documents forms part of the condition of award.

17. Instructions to respondents

17.1. Correspondence

17.1.1. No telephonic or any other form of communication with any other ECIC member of staff other than the named individual below, relating to this RFP, will be permitted. All enquiries must be in writing only.

17.1.2. All questions relating to the contents of the tender (conditions, rules, terms of reference, etc.) must be forwarded in writing via email to procurement@ecic.co.za by not later than Tuesday, 01 December 2026. Questions received after this date will not be entertained.

17.1.3. All questions must reference specific paragraph numbers, where applicable.

17.1.4. All enquiries (received on or before the closing date for enquiries) will be consolidated, and ECIC will publish one response document on the ECIC

website (www.ecic.co.za) within three working days after the date indicated in paragraph 17.1.2, on or before Friday, 04 December 2026.

17.1.5. No requests for information shall be made to any other person or place, and in particular not to the existing provider of this service.

17.2. **Submission of the proposals**

17.2.1. Bid documents must be clearly marked for ease of reference and be submitted in PDF format on/or before the closing date and time to the following email address:

procurement@ecic.co.za

17.2.2. The following email submission procedures or protocols must be adhered to ensure safe and secure submission of the tender documents and supporting documents:

17.2.2.1. The tender document, including the supporting or returnable documents, should be submitted via email in PDF format.

17.2.2.2. If the PDF tender document, including the supporting or returnable documents, is less than 20 Megabytes (MB), it should be submitted as one document. If the electronic bid document is more than 20MB, the electronic tender document should be split in order to adhere to the 20MB email capacity.

17.2.2.3. Bidders are also encouraged to submit a USB detailing their tender proposals.

17.2.3. In the event that bidders are experiencing challenges with emailing documents, tenders can be hand-delivered at the ECIC Offices on/or before the closing date and time at:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

17.2.4. **Any proposal received after the closing date and time will not be accepted.**

17.2.5. All proposals and all subsequent information received from respondents will not be returned. The proposals should be addressed to the Head of Procurement of ECIC.

18. Timeline of the bid process

18.1. The period of validity of the tender and the withdrawal of offers, after the closing date and time, is 120 days, expiring on Wednesday, 14 April 2027. If there is a need to extend the bid validity period, ECIC will request, in writing, permission to extend the validity period from all bidders before the expiry of the current validity period.

18.2. After the due date for response from bidders on the request to extend the validity period, ECIC will assume that all bidders have agreed to the request to extend and continue evaluating all bids received at the closing date and time as received on the closing date and time. Any award will be on the quoted bid amount as indicated in the proposal as at the closing date and time of the bid. If a bidder does not agree to extend the validity period on the original terms (as at the closing date of the bid), ECIC will stop evaluating the proposal received from such bidder.

18.3. The project timeframes of this bid are set out below:

Table 9

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on the Government e-tender portal /ECIC Website	Tuesday, 24 November 2026
2.	Questions relating to the bid from the bidder(s)	Tuesday, 01 December 2026
3.	Response to the questions from the bidders	Friday, 04 December 2026
4.	Bid closing	Tuesday, 15 December 2026
5.	Compliance Evaluation	Friday, 18 December 2026
6.	Functional Evaluation	Wednesday, 23 December 2026
7.	Preference Points	Wednesday, 23 December 2026
8.	Bid Adjudication	Friday, 29 January 2027

18.4. All dates and times in this bid are in South African Standard Time.

18.5. Any time or date in this bid is subject to change at the discretion of ECIC. The establishment of a time or date in this bid does not create an obligation on the part of ECIC to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if ECIC extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

18.6. ECIC will notify all bidders of the outcome of the bid within 30 days from the date of acceptance of bid by the identified bidder.

19. Bid rules

19.1. Awarding a bid

19.1.1. ECIC will not award a bid to a bidder:

19.1.1.1. Who is or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder are restricted to conduct business with the State.

19.1.1.2. Who is in the employ of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who is in the employ of the State as contemplated in the Public Administration Management Act, 11 of 2014 and is prohibited from conducting business with the State in terms of section of PAMA.

19.1.1.3. Who is in the service of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder and has not declared their business interest as required in the applicable SBD4 form.

19.1.1.4. Has been found to have transgressed Prevention and Combating of Corrupt Activities Act,12 of 2004 (as amended).

19.1.1.5. Has been found to have transgressed or is transgressing the Competition Act, 89 of 1998 (as amended).

19.1.2. ECIC shall not award a bid or contract or order to a bidder whose tax affairs are not compliant, except to foreign bidders with no tax obligations in South Africa.

19.1.3. For a bidder or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who have declared their business interest as required in the applicable SBD4 form, ECIC will not award a bid to a bidder who has declared their interest and:

19.1.3.1. Is prohibited from conducting business with the State; or

19.1.3.2. Does not have permission to conduct remunerative work outside their employment.

19.1.4. ECIC will verify with the relevant Organ of State to determine if paragraphs 19.1.3.1 and 19.1.3.2 are not applicable.

19.1.5. ECIC will assume that, the person contemplated in paragraph 19.1.3 is prohibited from conducting business with the State or the person does not have permission to conduct remunerative work outside their employment if it does not receive any response within 21 days from such verification request to an Organ of State.

19.1.6. ECIC will then recommend awarding the bid to the bidder who achieved the second highest preference points, and should it be established that the bidder who achieved the second highest preference points has a person contemplated in paragraph 19.1.3, ECIC will conduct verification as contemplated in paragraphs 19.1.4and 19.1.5. This step can be performed up to the bidder who achieved the third highest preference points.

19.2. **Documents/information required as a condition of award**

19.2.1. Proof of registration: Valid registration on the National Treasury Central Supplier Database (CSD).

19.2.2. Completed and signed Standard Bidding Forms as follows:

Table 10

Invitation to bid (all bidders must ensure that this Form is duly completed and signed)	SBD 1
Declaration of Interest	SBD 4
Preference Points Claim Form	SBD 6.1

19.3. **Sub-contracting**

19.3.1. ECIC fully endorses the South African Government's transformation and empowerment objectives and in awarding the tender or contract, preference may be given to bidders (Generics) who are willing to subcontract not less than 30% of the contract to a company which is Black Owned, Black Women Owned, Black Youth Owned, owned by Black People with Disabilities, an EMEs and QSE. EME's and QSE's are allowed to bid without subcontracting.

19.3.2. If contemplating subcontracting, please note that a bidder will not be awarded points for Specific Goals if it is indicated in its Proposal that such bidder intends subcontracting more than 30% (thirty percent) of the value of the contract to an entity/entity that do not qualify for at least the same points that the bidder qualifies for, unless the intended subcontractor is a company which is Black Owned, Black Women Owned, Black Youth Owned, owned by Black People with Disabilities, an EME and QSE, with the capability to execute the subcontract.

19.3.3. A person awarded a contract may not subcontract more than 25% (twenty five) of the value of the contract to any other enterprise that does not have

an equal or higher Specific Goals than the person concerned, unless the contract is subcontracted to an EME that has the capability and ability to execute the subcontract.

19.4. **ECIC's rights**

19.4.1. ECIC reserves the right to:

19.4.1.1. Amend any bid conditions, bid validity period, bid specifications, or extend the bid closing date, all before the bid closing date. Such amendments will be posted on the ECIC's website under the relevant tender information. All prospective bidders must therefore ensure that they visit the website of ECIC (www.ecic.co.za) regularly before they submit their bid response to ensure that they are kept updated on any amendments in this regard.

19.4.1.2. Cancel or withdraw this bid at any time, as a whole or in part without reasons and without attracting any liability.

19.4.1.3. Award this bid to more than one bidder.

19.4.1.4. Award this bid in total or part.

19.4.1.5. Negotiate with all or some of the shortlisted bidders.

19.4.1.6. Not accept the lowest priced bid or award the bid to a bidder other than the highest scoring bidder.

19.4.1.7. Conduct site visits at bidder's offices and / or at client sites if so required.

19.4.1.8. Request any relevant information and/ or documents to verify or clarify information supplied in the bid response in relation, but not limited to the structure of the bidding entity, bidder's capacity, proposed solution, proposed timelines etc.

19.5. **Contract fees**

Where a bidder indicates that its prices are subject to confirmation, or are in any way conditional, such pricing will not be considered.

19.6. **Confidentiality**

Any information relating to the submissions, through the process or otherwise, shall be treated in strict confidence. In submitting a response, a Service provider agrees that it shall not be entitled to any information disclosed by another respondent to

ECIC, which ECIC has determined to be of a confidential nature. The content and details of the evaluation of submissions will remain confidential to ECIC.

19.7. **Other matters**

19.7.1. If the ECIC does not accept any proposal, it will declare this bid process closed and may then elect to:

19.7.1.1. Proceed on a completely different basis; and/or

19.7.1.2. Not to appoint any respondent (in the event it deems all or any of the proposals not appropriate).

19.7.2. The ECIC reserves the right to engage in any processes required to validate all claims made in the proposal.

19.7.3. The ECIC has the right to enter into negotiation with a prospective Service provider regarding any terms and conditions, including fees, of a proposed contract.

19.8. **Disclaimer**

19.8.1. The ECIC has produced this bid in good faith. However, the ECIC, its agents and its employees and associates, do not warrant its accuracy or completeness. The ECIC will not be liable for any claim whatsoever and howsoever arising (including, without limitation, any claim in contract, negligence or otherwise) for any incorrect or misleading information contained in this bid due to any misinterpretation of this bid.

19.8.2. This bid is a request for proposals only and not an offer document; answers to it must not be construed as acceptance of an offer or imply the existence of a contract between the ECIC and the bidder.

19.9. **Terms of engagement**

19.9.1. The ECIC's engagement of the service provider will be documented in a contract between the ECIC and the appointed bidder.

ANNEXES

Annexure A: Protection of personal information

1. ECIC recognises that when the Bidder submit its proposal in response to this Request for Quotations, it will provide personal information, which ECIC will process for the sole purpose of evaluating the Bidder's proposal. By submitting its proposal in responding to this Request for Quotations, the Bidder hereby provide its consent to the processing of its Personal Information by ECIC.

2. The following terms shall have the meaning ascribed to them:

    2.1. "**Personal Information**" shall bear the same meaning as ascribed to it under POPI;

    2.2. "**POPI**" means Protection of Personal Information Act, No. 4 of 2013;

    2.3. "**Responsible Party**" shall bear the same meaning as ascribed to it under POPI; and

    2.4. "**bid**" means this Request for Quotations.

3. ECIC as the Responsible Party undertakes to:

    3.1. comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;

    3.2. treat all Personal Information strictly as defined within the parameters of POPI;

    3.3. process Personal Information only in accordance with the consent it was obtained for, for the purpose agreed, as permitted by law;

    3.4. secure the integrity and confidentiality of any Personal Information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss, damage, unauthorised destruction, access, use, disclosure or any other unlawful processing of Personal Information;

    3.5. not transfer any Personal Information to any third party in a foreign country unless such transfer complies with the relevant provisions of POPI regarding transborder information flows; and

    3.6. not retain any Personal Information for longer than is necessary for achieving the purpose in terms of bid or in fulfilment of any other lawful requirement.

4. ECIC will ensure that all reasonable measures are taken to:

    4.1. identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;

4.2. establish and maintain appropriate security safeguards against the identified risks;

4.3. regularly verify that the security safeguards are effectively implemented;

4.4. ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;

4.5. provide immediate notification to the Bidder if a breach in information security or any other applicable security safeguard occurs; provide immediate notification to the Bidder where there are reasonable grounds to believe that the Personal Information has been accessed or acquired by any unauthorised person;

4.6. remedy any breach of a security safeguard in the shortest reasonable time and provide the Bidder with the details of the breach and, if applicable, the reasonable measures implemented to address the security safeguard breach;

4.7. provide immediate notification to the Bidder where the Bidder has, or reasonably suspects that, Personal Information has been processed outside of the purpose agreed to or consented to;

4.8. provide the Bidder, upon request, with all information of any nature whatsoever relating to the processing of the Personal Information for the purpose of the bid and any applicable law; and

4.9. notify the Bidder, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the Bidder.

5. The Bidder has the right to inspect the Personal Information processing operations, as well as the technical and organisational information security measures employed by the ECIC to ensure compliance with the provisions of this Annexure.

Annexure B: Format for fee proposal (Pricing Example)

This page has been left blank intentionally. Refer to the attached document titled Annexure B (Format for fee proposal (Pricing Example)).

APPLICABLE STANDARD BIDDING DOCUMENTS

SBD 1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE EXPORT CREDIT INSURANCE CORPORATION OF SOUTH AFRICA					
BID NUMBER:	ECIC09P-2026/27	CLOSING DATE:	15 DECEMBER 2026	CLOSING TIME:	11:00
DESCRIPTION	PROVISION OF MICROSOFT LICENSES INCLUDING SHAREPOINT STORAGE AND SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS				

BID RESPONSE DOCUMENTS MUST BE SENT TO THE FOLLOWING EMAIL ADDRESS:			
Preferably via email: procurement@ecic.co.za			
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	Lulama Makwela	CONTACT PERSON	Lulama Makwela
E-MAIL ADDRESS	procurement@ecic.co.za	E-MAIL ADDRESS	procurement@ecic.co.za

SUPPLIER INFORMATION						
NAME OF BIDDER						
POSTAL ADDRESS						
STREET ADDRESS						
TELEPHONE NUMBER	CODE		NUMBER			
CELL PHONE NUMBER						
FACSIMILE NUMBER	CODE		NUMBER			
E-MAIL ADDRESS						
VAT REGISTRATION NUMBER						
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA	
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS		
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES	☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES	☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES	☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES	☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES	☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. ~~**THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**~~
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE: WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER: ……

CAPACITY UNDER WHICH THIS BID IS SIGNED: ……
(Proof of authority must be submitted e.g., company resolution)

DATE: ……

SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

1.1. Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

1.2. Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. BIDDER'S DECLARATION

2.1.	Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest[2] in the enterprise, employed by the state?	**YES/NO**

2.1.1. If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

[2] the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2.	Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution?	**YES/NO**

2.2.1. If so, furnish particulars:

Full Name (Name of person employed by Export Credit Corporation of South Africa (SOC) Ltd, the procuring institution)	Relationship

2.3.	Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?	**YES/NO**

2.3.1. If so, furnish particulars:

Name of Related Enterprise	Registration (ID) Number

3. DECLARATION

I, the undersigned, in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1. I have read and I understand the contents of this disclosure;

3.2. I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium[3] will not be construed as collusive bidding.

3.4. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.5. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.6. There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.7. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

[3] Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

Name of declarer			
Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1 GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

1.1.1 the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

1.1.2 the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state
(*delete whichever is not applicable for this tender*).

~~1.2.1 The applicable preference point system for this tender is the 90/10 preference point system.~~

1.2.2 The applicable preference point system for this tender is the 80/20 preference point system.

~~1.2.3 Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.~~

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

1.3.1 Price; and

1.3.2 Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80.00
SPECIFIC GOALS	20.00
TOTAL POINTS FOR PRICE AND SPECIFIC GOALS	**100.00**

1.5 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.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2 DEFINITIONS

2.1 **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

2.2 **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3 **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4 **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

2.5 **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1 POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20 **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps	=	Points scored for price of tender under consideration
Pt	=	Price of tender under consideration
Pmin	=	Price of lowest acceptable tender

~~## 3.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT~~

~~### 3.2.1 POINTS AWARDED FOR PRICE~~

~~A maximum of 80 or 90 points is allocated for price on the following basis:~~

~~**80/20** **or** **90/10**~~

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \quad Ps = 90\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$

~~Where~~

~~Ps~~	~~=~~	~~Points scored for price of tender under consideration~~
~~Pt~~	~~=~~	~~Price of tender under consideration~~
~~Pmax~~	~~=~~	~~Price of highest acceptable tender~~

4 POINTS AWARDED FOR SPECIFIC GOALS

4.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for Specific Goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

Table 1: Specific goals for the tender and points claimed are indicated per the table below.
(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.
Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer) (Select or tick or indicate or place a mark in one block only)
B-BBEE Procurement Recognition Level of 135% and at least 50.1% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	20	
B-BBEE Procurement Recognition Level of at least 110% and at least 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	10	
B-BBEE Procurement Recognition Level of at least 110% and up to 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	5	
Any other B-BBEE Procurement Recognition Level up to 110%.	0	

[BIDDERS ARE REQUIRED TO INDICATE, IN ONE BLOCK, THE NUMBER OF POINTS THEY ARE CLAIMING FOR SPECIFIC GOALS IN THE TABLE IN PAGE Error! Bookmark

not defined. **(PARAGRAPH** Error! Reference source not found.**). IN THE EVENT WHERE A BIDDER MAKES A MARK (ONE MARK), ECIC WILL CONSIDER THE CORRESPONDING POINTS TO BE THE ONE WHICH THE BIDDER IS CLAIMING FOR. WHERE A BIDDER MAKES MULTIPLE MARKS OR DOES NOT MAKE ANY MARK OR INDICATION AT ALL IN THE TABLE, THE BIDDER WILL BE ALLOCATED ZERO (0) POINTS FOR SPECIFIC GOALS, NOTWITHSTANDING EVIDENCE PROVIDED.]**

4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

4.2.1 an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

4.2.2 any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

DECLARATION WITH REGARD TO COMPANY/FIRM

NAME OF COMPANY/FIRM				
COMPANY REGISTRATION NUMBER (ID NUMBER)				
TYPE OF COMPANY/ FIRM [TICK APPLICABLE BOX]				
Partnership/Joint Venture / Consortium			Personal Liability Company	
One-person business/sole proprietor			(Pty) Limited	
Close corporation			Non-Profit Company	
Public Company			State Owned Company	

4.3 I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

4.4 The information furnished is true and correct;

4.4.1 The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.4.2 In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

4.4.3 If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

4.4.3.1 disqualify the person from the tendering process;

4.4.3.2 recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

4.4.3.3 cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

4.4.3.4 recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

4.4.3.5 forward the matter for criminal prosecution, if deemed necessary.

SIGNATURE(S) OF TENDERER(S)	
NAME AND SURNAME (AUTHORISED SIGNATORY)	
SIGNATURE	
ADDRESS	
DATE OF SIGNATURE	

Checklist

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/NO
1.	SBD 1	Invitation to bid	Is the form duly competed and signed?	
2.	Contactable Reference letters		Has the bidder provided contactable reference letters from the bidder's clients where the implementation and/or support of Dynamics 365 (ERP – Finance and SCM) services were provided?	
3.	Contactable Reference letters		Has the bidder provided contactable reference letters from the bidder's clients where implementation and/or support of Power BI and/or Microsoft environment services were provided?	
4.	Approach and methodology		Has the bidder provided a clear methodology or approach which covers the scope of work?	
5.	Proof of OEM partnership		Has the bidder provided proof of Microsoft™ Partnership for Dynamics and Power BI? **Proof from distributors will not be accepted.**	
6.	Bidder's team experience		Has the bidder provided copies of CVs and qualifications of the proposed team, including the project lead, Dynamics 365 resources and Power BI resources?	
7.	Security and compliance		Has the bidder provided the security and privacy compliance attestation giving details on the following: • Bidder's business continuity arrangements in the event of loss of key resources, business operations or disruption to key processes. • Bidder's approach and principles to ensure secure software development processes. • Bidder's Alignment with ISO 27001, on which ECIC's ISMS is based. • Compliance with POPIA.	

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/NO
8.	SBD 4	Declaration of Interest	Is the form duly competed and signed?	
9.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly competed, Specific Goals points claimed, and form signed? Refer to **the table in page 41 (paragraph 4.1)**	
10.	B-BBEE status level verification certificate or Sworn Affidavit		Is proof of B-BBEE Status level of contributor attached? Bidder must attach copy of B-BBEE Certificate or copy of Sworn Affidavit, whichever is applicable.	
11.	CSD Report or MAAA Number			
12.	Tender submission (if the bidder is submitting physical information/ documents)		Two (2) printed copies (one original and one copy) submitted? (if submitting physical copies)	
			One (1) electronic copy submitted?	

I, the undersigned (name) ……..…… certify that the information furnished on this checklist is true and correct.

Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	