



REQUEST FOR INFORMATION (RFI)

ECIC02I-2023/24

**INSURANCE MANAGEMENT SYSTEM (INCLUDING SUPPORT AND MAINTENANCE
FOR A PERIOD OF FIVE (5) YEARS)**

CLOSING DATE: 11 JULY 2023

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

This document allows for filling of forms, please complete electronically by filling out the indicated sections below and choosing the relevant items on the dropdown areas. Once completed, you can convert the document into PDF and send via email (procurement@ecic.co.za) to ECIC.

YOUR EXPORT RISK PARTNER

REQUEST FOR INFORMATION: INSURANCE MANAGEMENT SYSTEM (INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF 5 YEARS)

Specified request

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A. INTRODUCTION

1. Introduction

- 1.1 The Export Credit Insurance Corporation of South Africa (SOC) Limited (ECIC or Corporation)¹ 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 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 from offices at Block C7 Eco Origins Office Park, 349 Witch Hazel Avenue, Highveld Ext 79, Centurion, 0157, South Africa.

2. Purpose

- 2.1 ECIC intends procuring an insurance management system (including support and maintenance for a period of five (5) years). Before issuing a competitive bid, ECIC wants to understand the market and its offerings.
- 2.2 **The purpose of this Request for Information (RFI) is an information gathering and market testing exercise, intended only to inform and assist the ECIC for further deliberation, budgeting and sourcing for a fit-for-purpose insurance management system.**
- 2.3 Potential suppliers who do not respond to this RFI **will not** be precluded from bidding in future open bid(s) issued by ECIC. Information provided in this RFI is for industry research only and will not be used to any respondent's advantage or disadvantage in future open tenders.

3. Enquiries

- 3.1 All enquiries regarding this RFI must be sent in writing to the Head of Procurement on/or before **04 July 2023** to the following email address:

procurement@ecic.co.za

- 3.2 All questions must reference specific paragraph numbers, where applicable.

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

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3.3 ECIC will not entertain any enquiries regarding this bid sent to any other email address or received through any other means, except as instructed in paragraph 3.1.

3.4 All enquiries received by ECIC will be consolidated and responded to in one response, which will be published on the website of ECIC (www.ecic.co.za), next to the respective bid on **05 July 2023**.

4. Submission of responses

4.1 **This document allows for filling of forms, please complete electronically by filling out the indicated sections below and choosing the relevant items on the dropdown areas. Once completed, you can convert the document into PDF and send via email (procurement@ecic.co.za) to ECIC.**

4.2 Responses must be clearly marked for ease of reference.

4.3 All responses must be submitted on PDF format on/or before the closing date and time to the following email address:

procurement@ecic.co.za

5. Right of cancellation

5.1 ECIC reserves the right to discontinue the tender procedure at any stage and not continue with a Request for Proposal (RFP), Request for Bid (RFB) or Request for Quotation (RFQ). Responding to this RFI does not mean that the vendor will be requested to submit a formal RFP or RFB or RFQ.

6. Confidentiality

6.1 Any information relating to the submissions, through the process or otherwise shall be treated in strict confidence. In submitting a response, the responder 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.

7. Protection of personal information

7.1 ECIC recognises that when a Responder respond to this RFI, the Responder may provide personal information, which ECIC will process for the sole purpose of evaluating the Responder's response. By submitting its response in responding to this Request for Information, the Responder hereby provide its consent to the processing of its Personal Information by ECIC.

7.2 The following terms shall have the meaning ascribed to them:

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

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- 7.2.2 “**POPI**” means Protection of Personal Information Act, No. 4 of 2013;
 - 7.2.3 “**Responsible Party**” shall bear the same meaning as ascribed to it under POPI; and
 - 7.2.4 “**bid**” means this Request for Information.
- 7.3 ECIC as the Responsible Party undertakes to:
- 7.3.1 comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;
 - 7.3.2 treat all Personal Information strictly as defined within the parameters of POPI;
 - 7.3.3 process Personal Information only in accordance with the consent it was obtained for, for the purpose agreed, as permitted by law;
 - 7.3.4 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;
 - 7.3.5 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
 - 7.3.6 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.
- 7.4 ECIC will ensure that all reasonable measures are taken to:
- 7.4.1 identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;
 - 7.4.2 establish and maintain appropriate security safeguards against the identified risks;
 - 7.4.3 regularly verify that the security safeguards are effectively implemented;
 - 7.4.4 ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;
 - 7.4.5 provide immediate notification to the Responder if a breach in information security or any other applicable security safeguard occurs;

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- 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;
- 7.4.6 remedy any breach of a security safeguard in the shortest reasonable time and provide the Responder with the details of the breach and, if applicable, the reasonable measures implemented to address the security safeguard breach;
- 7.4.7 provide immediate notification to the Responder where the Responder has, or reasonably suspects that, Personal Information has been processed outside of the purpose agreed to or consented to;
- 7.4.8 provide the Responder, 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
- 7.4.9 notify the Responder, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the Responder.
- 7.5 The Responder 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 paragraph 7.

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B. REQUEST FOR INFORMATION RULES

8. Completeness

8.1 Respondents must check number of pages submitted and ensure that there are no missing pages or information. ECIC shall not accept any liability for any missing pages or information.

9. Costs

9.1 ECIC shall in no manner be responsible for any costs incurred by the Responder in preparation and submission of response in relation to this RFI.

10. Ownership of responses

10.1 All responses in response to this RFI, will become the property of ECIC.

11. Form of RFI

11.1 RFI documents must be completed by the Respondent in non-erasable, legible and ²visible ink.

11.2 Where the space provided in the RFI document is insufficient, separate schedules may be drawn up in accordance with the prescribed formats. These schedules must be bound with a suitable contents page and submitted with the RFI documents.

12. Signing of RFI

12.1 The RFI must be signed by a person who is duly authorised to do so.

13. Jurisdiction

13.1 This RFI and any subsequent tender and contract or order is governed by the laws of the Republic of South Africa.

14. Language

14.1 The RFI is drafted in English and any responses will be interpreted and construed in English.

14.2 All responses must be submitted in English language.

15. Gender

15.1 Any word implying any gender shall be interpreted to imply all other genders.

² Visible to human eye.

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16. Headings

16.1 Headings are incorporated into this proposal and submitted in response thereto, for ease of reference only and shall not form part thereof for any purpose of interpretation or for any other purpose.

17. Confidentiality

17.1 Any information relating to the submissions, through the process or otherwise shall be treated in strict confidence. In submitting a response, a Responder 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, except instructed so by a court of law. The content and details of the evaluation of submissions will remain confidential to ECIC.

18. Disclaimer

18.1 The ECIC has produced this RFI 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 RFI due to any misinterpretation of this bid.

18.2 This RFI is solely for information gathering 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 Responder.

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C. Request for Information

19. Background information

- 19.1 ECIC's main business is to promote trade with foreign countries or buyers in foreign countries by providing insurance cover in connection with export transactions, investments and loans or similar facilities connected with such transactions. It effectively underwrites any losses as a result of commercial causes of loss (insolvency or non-payment) or political causes of loss (nationalisation, expropriation, change in law or currency risk and other related events). The insurance cover is provided to South African registered financial institutions who provide the necessary funding or loans to finance export transactions, South African exporters who provide both goods and services to foreign buyers and South African investors who invest in foreign entities.
- 19.2 The Corporation has adopted a digital transformation strategy that seeks to automate key business processes that are currently manual to improve business efficiency. The insurance management business process within the Corporation is currently a manual process hence the requirement for an electronic insurance management system.
- 19.3 The ECIC requires an insurance management system to automate the management of its insurance portfolio catering for its lines of business offered under its Short-term Insurance (General Insurance, Property and Casualty Insurance) license, this includes short term and medium-long term export credit insurance, investment insurance and performance bond products, which will address historical challenges of manual core processes, disintegrated data, duplications, and lack of real time reporting.
- 19.4 To achieve the requirements, ECIC is approaching the market to determine if there are potential bidders who could provide a suitable insurance management system, including support and maintenance for a period of five (5) years when it approaches the market for competitive bidding.

20. Required solution/system

- 20.1 ECIC requires an insurance solution, that, among other things, provides for the following capabilities:

20.1.1 Administration portal (backend)

20.1.1.1 Customer Relations Management (CRM)

20.1.1.1.1 Capture and allocate leads and opportunities (pipeline).

20.1.1.1.2 Maintain account and contact details.

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- 20.1.1.1.3 Maintain the call history with customers (e.g., interactions via emails, telephonic conversations, notes).
 - 20.1.1.1.4 Outlook email and calendar integration.
 - 20.1.1.1.5 Sales performance management (forecasting, projections, etc.).
 - 20.1.1.1.6 Define relationships across accounts e.g., subsidiary, holding company, associated company, ultimate holding company.
- 20.1.1.2 **Underwriting**
- 20.1.1.2.1 Assess the feasibility of new projects / transactions (i.e. new insurance policy).
 - 20.1.1.2.2 Assess the risk profile of buyers, policyholder and track their exposure across all product lines.
 - 20.1.1.2.3 Submit cover requests for approval (approval based on delegation of authority and cover/claim amount).
 - 20.1.1.2.4 Generate quotations for a requested insurance cover.
 - 20.1.1.2.5 Maintain a history of reviews conducted on buyers, policyholders, countries, projects, claims, etc.
- 20.1.1.3 **Product administration**
- 20.1.1.3.1 Maintain insurance cover products.
 - 20.1.1.3.2 Maintain pricing based on product rules and transactions.
 - 20.1.1.3.3 Configure specific rules and workflows for products.
 - 20.1.1.3.4 Enable delegated approval authority.
- 20.1.1.4 **Policy administration**
- 20.1.1.4.1 Generate a policy schedule.
 - 20.1.1.4.2 Maintain the policy lifecycle (activation to closure).
 - 20.1.1.4.3 Maintain the insured exposure and premiums.
 - 20.1.1.4.4 Administer policy amendments.

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20.1.1.5 **Claims administration**

- 20.1.1.5.1 Administer claims.
- 20.1.1.5.2 Capture costs relating to claims (e.g., legal fees, administration fees).
- 20.1.1.5.3 Configurable workflows for the processing of claims.
- 20.1.1.5.4 Handle different types of claims (e.g., liquidation, protracted defaults).
- 20.1.1.5.5 Maintain a history of interactions relating to claims (e.g., emails, telephonic conversations, notes).
- 20.1.1.5.6 Capture information about salvages or recoveries including related costs.
- 20.1.1.5.7 Submit claim requests for approval (approval based on delegation of authority and cover/claim amount).

20.1.2 **BROKER PORTAL**

- 20.1.2.1 Submit insurance cover applications on behalf of a customer.
- 20.1.2.2 Maintain the customer details.
- 20.1.2.3 Monitor the policy portfolio of customers.
- 20.1.2.4 Submit claims on behalf their customers.
- 20.1.2.5 Monitor the status of applications and claims.

20.1.3 **CUSTOMER PORTAL**

- 20.1.3.1 Register on the portal and maintain their profile.
- 20.1.3.2 Apply for insurance cover.
- 20.1.3.3 Monitor their policy portfolio.
- 20.1.3.4 Notify and lodge claims.
- 20.1.3.5 Monitor the status of applications and claims.

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- 20.1.3.6 Capture information about the export transaction /project (name, description, currency, transaction amount, country, sector, export goods, contract details, etc.).
- 20.1.3.7 Capture the information of participants involved in a transaction or project (Policyholder, Exporter, Financier, Buyer).
- 20.1.3.8 Capture additional information about the Buyer (s) (trade background, financials, anticipated turnover, sales per country, etc.) to be used assess the risk of the buyer and applicable limits.

20.1.4 REPORTING

- 20.1.4.1 The system should provide a business intelligence capability for dashboards and reporting.
- 20.1.4.2 The following are a list of reports, amongst others, that will need to be generated regularly:

Table 1

Report/ Information	Description	Format	Frequency
Deal Pipeline Report	Update on the status of leads and opportunities in the pipeline. The report is primarily used by the Business Development and Underwriting Units.	Excel / PDF	Adhoc
Insurance Portfolio Status Report	Update on the status of the insurance (policy) portfolio including the sum insured, movement of drawdowns, repayments of loans. The report is primarily used by the Underwriting and Portfolio Units.	Excel / PDF	Adhoc
Claims Status Report	Update on the status of current and expected claims. The report is primarily used by the Portfolio and Legal Units.	Excel / PDF	Adhoc

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20.1.5 DOCUMENT MANAGEMENT

- 20.1.5.1 Store and maintain any documents related to the various activities that can be performed in the system.
- 20.1.5.2 Maintain versions of documents and an audit trail of changes.

20.1.6 NON-FUNCTIONAL REQUIREMENTS

- 20.1.6.1 Hosting – the system should be hosted in a secure cloud environment.
- 20.1.6.2 Security – the application should have role-based access control and preferably with Windows/Azure AD authentication.
- 20.1.6.3 Auditing – the application should maintain an audit trail of the activities performed on the system.
- 20.1.6.4 Accessibility – the system should be accessible remotely using a secure connection.
- 20.1.6.5 Encryption – all transit data should be encrypted or transferred via a secured channel.
- 20.1.6.6 Availability – the application should be available 24/7.

20.1.7 INTEGRATION

- 20.1.7.1 The system should integrate to credit assessment providers to source credit information that can be used to assess the risk of transactions and buyers (e.g., Experian, Debt Source).
- 20.1.7.2 The system should integrate to compliance systems to conduct background checks and due diligence on potential or existing clients, this includes checks on sanctions, debarments, etc. (e.g., LexisNexis).
- 20.1.7.3 The system should integrate to the CIPC to assess the compliance status of the entities (e.g., tax status, judgements).
- 20.1.7.4 The system should integrate with the ERP (Microsoft Dynamics 365) to raise invoices (related to premiums, project assessments, etc.) and track payments for settled invoices and claims.
- 20.1.7.5 The system should preferably integrate with Microsoft SharePoint for the storage and archiving of documents.

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- 20.1.7.6 The system should have an Application Programming Interface (API) to allow integration from other systems used by the ECIC such as Microsoft Dynamics 365 ERP and Workday Budgeting Tool.

20.1.8 TRAINING, SUPPORT AND MAINTENANCE

- 20.1.8.1 The service provider will be required to provide training to all the identified end users of the system prior to go-live.
- 20.1.8.2 Once the system has been implemented, the service provider will be required to provide 2nd level support and maintenance for the period of the contract.
- 20.1.8.3 The support can be provided remotely however where necessary a representative of the service provider may be required to be present at the ECIC office in Centurion.

20.1.9 ASSUMPTIONS

- 20.1.9.1 The proposed system will include take-on of historical data that may be deemed necessary.

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D. Request for Information Response Instructions

1. This document allows for filling of forms, please complete electronically by filling out the indicated sections below and choosing the relevant items on the dropdown areas. Once completed, you can convert the document into PDF and send via email (procurement@ecic.co.za) to ECIC.

2. Contact Details:

Contact details	
Company Name:	
Contact Person:	
Position within the company:	
Email Address:	
Telephone Number:	
Physical address	
Company Website:	

3. Company Profile:

Please tell about your organisation													
<p>Company Category: Which category best describes your organisation?</p>	<table border="1"> <thead> <tr> <th>Company Category</th> <th>Staff Headcount</th> <th>Turnover</th> </tr> </thead> <tbody> <tr> <td>Large/Generic</td> <td>> 250</td> <td>> R50 m</td> </tr> <tr> <td>Qualifying Small Enterprise</td> <td>50 < 250</td> <td>≥ R10 m and ≤ R50 m</td> </tr> <tr> <td>Small Medium Enterprise (including Micro)</td> <td>0 < 50</td> <td>≤ R10 m</td> </tr> </tbody> </table>	Company Category	Staff Headcount	Turnover	Large/Generic	> 250	> R50 m	Qualifying Small Enterprise	50 < 250	≥ R10 m and ≤ R50 m	Small Medium Enterprise (including Micro)	0 < 50	≤ R10 m
	Company Category	Staff Headcount	Turnover										
Large/Generic	> 250	> R50 m											
Qualifying Small Enterprise	50 < 250	≥ R10 m and ≤ R50 m											
Small Medium Enterprise (including Micro)	0 < 50	≤ R10 m											
	Please Choose (Dropdown)												
When was your company established?													
Total Number of Full Time Employees													
B-BBEE Contributor Level	Choose an item.												

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4. Questions

Q1.1.	What Is Your Core Business?
Answer:	
Q1.2.	Describe any third-party alliances/relationships that you have formed with other service providers for the provision of these services, i.e. which services are provided by subcontractors / via consortiums etc.
Answer:	
Q1.3.	Your solution offering, will it be developed or is it off the shelf? If the solution is off-the-shelf, can it be customised?
Answer:	
Q1.4.	For development, what are the estimated timeliness from inception to sign-off?
Answer:	
Q1.5.	Is your solution web based or desktop client?
Answer:	
Q1.6.	Is your solution hosted or client based?
Answer:	
Q1.7.	Do you provide support and maintenance for your solution/system? If yes, what is the minimum period?
Any other information you can provide to ECIC.	
Answer:	
Q1.8.	Do you provide training for your solution/system?

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	If yes, please briefly describe how the system administrators and end users will be trained?
Answer:	
Q1.9.	Does your proposed system/solution allow for API integration to or from other systems used by the ECIC such as Microsoft Dynamics 365 ERP and Workday Budgeting Tool? If yes, provide details of any special integration requirements.
Answer:	
Q1.10.	Does your proposed system/solution require any licenses? If yes, provide details of on the license requirements.
Answer:	
Q1.11.	Will the licensing cost be fixed or based on the number of users? If it is based on users, please indicate the cost per user.
Answer:	

5. Public Sector Tendering:

Q2.1.	What would encourage or prevent you from submitting a proposal for the upcoming bid for the provision of the insurance system?
Answer:	

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Q2.2.	What are the “must haves” that need to be included in any tender specification in order for you to be able to provide a realistic solution to ECIC?
Answer:	

6. Additional Information:

Additional Information:	
Q3.1.	Are there any other areas of interest that we have not addressed in this RFI that you wish to mention? Please provide any additional commentary, insights, lessons learnt, views or suggestions that may be relevant to ECIC in this RFI process.
Answer:	

REQUEST FOR INFORMATION:

Terms of Reference

Annexure B: Pricing Template/Example

1. For budgeting purposes, ECIC requires information on expected costs and such costs must include amongst others the items below.

Pricing component	Total
Solution licensing for a period of five (5) years (if applicable)	
Implementation cost (configuration/development, historical data migration, testing, deployment, and training)	
Support and maintenance for a period of five (5) years	
Total excluding Value Added Tax	
Value Added Tax (at 15%)	
Total including Value Added Tax	

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2. **The information provided above will be utilised for budgeting and sourcing strategy purposes.**

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

Position/Title of declarer			
Name of responder (Name of Audit Firm/ Company/Entity Name)			
Signature of declarer		Date of signature	