



REQUEST FOR PROPOSAL

BID NUMBER: ECIC04P-2026/27

AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

CLOSING DATE: 14 JULY 2026

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

NOTICE (3 JULY 2026)

Due to a request from potential bidders, the original bid document has been amended as follows:

1. The Annexure D: Checklist that went out with the bid document was incorrect; the correct Annexure D: Checklist has been replaced.

Except for the amendment as indicated above, there are no other material amendments to the bid document.

Address Byls Bridge Office Park, Building 9, Fourth Floor, 11 Byls Bridge Boulevard, Highveld Extension 73, Centurion, 0157, South Africa
Tel +27 (0)12 471 3800 | **Email** info@ecic.co.za | **Website** www.ecic.co.za

Directors: Ms. DP Ndlovu (Chair), Ms. LR Seroka (CEO), Mr. S Mayekiso, Ms. SK O' Mahony, Mr. BI Mkhize, Ms. PM Mthethwa, Ms. XE Daku; Mr. W van Der Spuy, *Mr. L. Govender, Mr. S Bhanisi | Company Secretary: Ms. N Moffatt

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.

Spuy

*alternate to Mr. W van Der

YOUR EXPORT RISK PARTNER

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

CONTENTS

A. INTRODUCTION TO THE REQUEST FOR PROPOSAL (RFP)	4
1. Introduction	4
2. Purpose	4
3. Non-compulsory briefing session	4
4. Background	5
5. Procurement Regulations	6
B. TERMS OF REFERENCE	7
6. Scope of services	7
7. System requirements	7
8. Phase 2 onwards (Phase 2 will be billed on time and material, based on hourly rate)	15
9. Requirements applicable across all phases:	17
10. Documentation:	20
11. Delivery address	20
12. Bid/contract conditions	20
13. Due diligence/site inspection	21
14. Bid evaluation	21
15. Phase One: Pre-qualification	22
16. Phase Three: Functional	23
17. Phase Four: System Demo and Presentation	27
18. Phase Five: Preference point system	29
19. Document(s) required to substantiate claims for Specific Goals	30
20. Phase Six: Objective criteria	30
21. Standard bidding documents	31
22. Instructions to respondents	31
23. Timeline of the bid process	33
24. Bid rules	34
ANNEXES	38
Annexure A: Protection of personal information	38
Annexure B: Format for fee proposal (Pricing Example)	40
Annexure C: Self Evaluation	41

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

APPLICABLE STANDARD BIDDING DOCUMENTS..... 42

SBD 1 42

SBD 4 44

SBD 6.1 48

Annexure D: Checklist..... 54

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

A. INTRODUCTION TO THE REQUEST FOR PROPOSAL (RFP)

1. Introduction

- 1.1. The Export Credit Insurance Corporation of South Africa (SOC) Limited¹ (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 supplier to provide and implement a modern and AI-ready Customer Relationship Management (CRM) system in a Software as a Service Model, including **36 months** post-Phase One implementation support and maintenance (**Phase One Minimal viable product (MVP) is anticipated to take up to 3 months**).

3. Non-compulsory briefing session

- 3.1. Potential bidders are encouraged to attend a non-compulsory briefing session scheduled for 11H00 to 12H30 (South African Standard Time) on Tuesday, 23 June 2026, as questions relating to this bid will be addressed. The briefing session will be held at the following address (link):

<https://teams.microsoft.com/meet/36131519155993?p=3TEmpRR4RYBHE5TRFF>

The meeting is scheduled for 1 hour 30 minutes, and ECIC will not be compelled to repeat any topics already covered to latecomers. In the event that the briefing session is finished before the scheduled end time (12H30 (South African Standard Time)), the meeting will be adjourned and ECIC will not be compelled to re-open the session.

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

4. Background

- 4.1. The ECIC is on the drive to digitally transform its core business, which includes the customer relationship management processes in areas of sales (leads and pipeline management), complaints management (case management) and Marketing (campaign management).
- 4.2. The ECIC does not have a contact centre environment and intends to leverage technology to enable service capabilities for its clients in areas of sales leads/ enquiry submission, filing of complaints, attending to follow-ups, campaign management and optimising the use of frequently asked questions (FAQs) to disseminate information.
- 4.3. Implementing a modern, scalable AI-ready CRM system (solution) has been identified as a key priority to be implemented and usable by **March 2027** to assist the ECIC in reducing turnaround times and improving operational efficiencies.
- 4.4. The CRM system will be the first platform implemented towards automation of the core processes, while the ECIC works on sourcing an Export Credit Agency (ECA) aligned Insurance Management System (IMS)
- 4.5. Despite attempts to develop a CRM solution in-house using PowerApps, which was not adopted fully, the processes for CRM and core business are manual and labour-intensive, with heavy reliance on email communication and storing documents in SharePoint.
- 4.6. The data stored in the in-house developed CRM system is estimated at **4 000** contacts. The successful bidder may need to advise and assist with the import of these contacts to the new CRM platform.
- 4.7. There is no single platform to store all customer interactions, documentation and forms submitted during the application process. Trackability and traceability remain challenges with limited capability for SLA-aligned performance management.
- 4.8. The Department of Trade and Industry (**dtic**) has since launched a leads platform, the **IFW** – Integrated Financing Website (<https://industrialfinancing.co.za>), for its entities, including the ECIC. The leads from the IFW will be shared with the ECIC via email; however, the intention is for the **dtic** IFW and the ECIC CRM system to integrate via API to enable real-time sharing of data.
- 4.9. The successful bidder is required to implement a minimal viable product (MVP) by **March 2027 as part of the Phase One of the ECIC CRM implementation**. It is anticipated that the MVP will largely cover standard functionality for complaints management, leads management and limited Marketing capability. However, the ECIC will rely on the bidder's expertise and experience to advise on the most appropriate MVP deliverables to ensure maximum system adoption in the shortest space of time.
- 4.10. Current volumes of sales leads and complaints are low, estimated at fewer than 250 leads and fewer than 10 external complaints per month; however, these volumes are expected to increase significantly over time.
- 4.11. The implementation of the system will be in phases as per the score of the work. The bidder is expected to quote for license subscription and implementation of Phase one; Phase Two implementation onwards will be covered as part of the enhancements to be

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

agreed with the ECIC before implementation. The pricing template contains a guide on how the ECIC envisage the cost breakdown.

4.12. The summary of the current ECIC technology environment:

- 5.3.1. 110 end users (Slightly below 100 roles filled).
- 5.3.2. Windows server environment.
- 5.3.3. Hybrid Active Directory (AD) (Local and AZURE AD):
 - 5.3.3.1. SSO (Single Sign-On).
 - 5.3.3.2. MFA (Multi – Factor Authentication).
- 5.3.4. Microsoft 365™ E3 and SharePoint Online.
- 5.3.5. VOIP (Hosted 3CX).
- 5.3.6. Microsoft D365™ Finance and Operations.
- 5.3.7. PaySpace™ Payroll.
- 5.3.8. Connectivity (Active-Active):
 - 5.3.8.1. 100MB Fibre.
 - 5.3.8.2. 100MB Microwave link.
- 5.3.9. No bulk email or SMS service exists.

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 successful bidder will be required to:

- 6.1.1. Provide, implement, and commission a CRM system in a SaaS model. Refer to paragraph 7 for detailed information (including other parts of this bid document, including paragraphs 7, 8, 9, and 10).
- 6.1.2. Provide training and change management. Refer to paragraph 9.1.2 for detailed information.
- 6.1.3. Provide system testing. Refer to paragraph 9.1.3 for detailed information.
- 6.1.4. Support and maintain the provided system for a period of 36 months post-implementation. Refer to paragraph 9.1.4 for detailed information.

7. System requirements

7.1. The system must be implemented in phases as follows:

7.1.1. **Phase One (Includes but not limited to the minimal viable product – MVP to be usable by 31 March 2027) to include:**

7.1.1.1. User licenses

- 7.1.1.1.1. For Phase One MVP, it is anticipated that up to **25** internal users will utilise the system. The MVP may include portions of the requirements defined for Phase One.
- 7.1.1.1.2. License subscription usage may increase gradually as more functionality is implemented. An increase in licenses is anticipated by year two. Additionally, users must be provisioned as and when required by the ECIC, preferably after an annual review of licenses to determine if license usage should be reduced or increased. However, the flexibility to increase and reduce licenses annually is desirable.
- 7.1.1.1.3. The successful bidder, once appointed and having understood the ECIC requirements fully, is expected to provide expert guidance on the most cost-effective use of licenses between full license and view-only access, where applicable for internal users, and or various license types for the proposed CRM solution.
- 7.1.1.1.4. The bidder is to load and bill only for licenses that will be utilised post go-live and gradually increase licenses as and when required.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

7.1.1.1.5. Licenses to the production system must be usable from the date of go-live and valid for 36 months from go-live.

7.1.1.1.6. License used by the bidder during the configuration/ development of system features before successful completion of user acceptance testing (UAT) and go-live must be provided by the bidder/ OEM. Phase One MVP per function will consist of a manager and staff, for whom the UAT licenses/ access must be catered to.

7.1.1.2. **Case Management functionality for complaints management:**

7.1.1.2.1. **Multi-Channel Compliant Logging (Digital):**

7.1.1.2.1.1. The system must allow multi-channel logging of complaints:

- a. Email.
- b. Telephone.
- c. Walk-in (face-to-face interactions).
- d. Internal referrals.
- e. Online platforms including portal/chat function and social media integration).

7.1.1.3. **Manual capture for non-digital channels:**

7.1.1.3.1. The system must support manual complaint capture by a Complaints Specialist for complaints received through non-digital channels.

7.1.1.3.2. The system must provide a structured form for logging complaints, capturing at minimum: Customer (Complainant) type (internal or external), Complainant details, contact information, Complaint description, Date and time of complaint, Business unit involved, Complaint category and sub-category, Severity level and Priority level.

7.1.1.4. **Mandatory Field Validation**

7.1.1.4.1. The system must validate mandatory fields before allowing a complaint to be saved.

7.1.1.4.2. The system must automatically send notifications to the complainant at the following complaint lifecycle stages:

7.1.1.4.2.1. Complaint successfully logged,

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

7.1.1.4.2.2. Complaint assigned,

7.1.1.4.2.3. Requests for additional information,

7.1.1.4.2.4. Complaint updates (where applicable),

7.1.1.4.2.5. Outcome or resolution communicated,

7.1.1.4.2.6. Escalation initiated (if applicable), and

7.1.1.4.2.7. Complaint closed

7.1.1.4.3. The system must notify assigned personnel of newly logged and assigned complaints.

7.1.1.4.4. The system must automatically alert responsible users or teams when:

7.1.1.4.4.1. SLA thresholds are approaching,

7.1.1.4.4.2. Complaint handling timelines are exceeded.

7.1.1.5. **Pending Action Reminders**

7.1.1.5.1. The system must provide reminders for pending complaint actions to ensure timely resolution and avoid breaches in SLA targets.

7.1.1.5.2. The system must support a configurable complaint lifecycle with defined statuses (e.g. Logged, Assigned, In Progress, Escalated, Resolved, Closed).

7.1.1.6. **Complaint Investigation and Resolution**

7.1.1.6.1. The system must allow authorised users to capture and maintain the following information (status updates) against a complaint record:

7.1.1.6.1.1. Investigation findings.

7.1.1.6.1.2. Outcome and resolution details.

7.1.1.6.1.3. Corrective actions taken.

7.1.1.6.1.4. These details must be stored as part of the complaint record and be auditable.

7.1.1.6.1.5. Allow users to capture.

7.1.1.6.2. The system must automatically send the complaint outcome or resolution to the customer via the customer's preferred communication channel. The preferred channel

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

must be configurable (e.g. email, SMS, portal). Communication content must be configurable via templates.

7.1.1.7. **Automated Escalation on Dissatisfaction, Escalation and Closure**

7.1.1.7.1. The system must automatically trigger an escalation workflow when a customer indicates dissatisfaction with the outcome. Escalation rules must be configurable. Escalated complaints must be clearly identified in the system.

7.1.1.7.2. The system must prevent closure of a complaint until:

All mandatory fields are completed including required investigation, resolution, and communication steps are completed.

7.1.1.7.3. The system must allow only authorised users (e.g. Complaints Specialist) to close complaints.

7.1.1.7.4. The system must record the following upon complaint closure:

Closure date, Name or UserID of the confirming user, Final complaint status.

7.1.1.7.5. The system must maintain a complete audit trail covering:

Investigation activities, Resolution communication, Customer feedback, Escalations and Complaint closure.

7.1.1.7.6. The system must support reporting on:

Resolution turnaround times, Complainant satisfaction levels, Escalation volumes and Closure compliance rates.

7.1.1.8. **Business Development:**

7.1.1.8.1. **Leads Management**

7.1.1.8.1.1. The CRM system must provide functionality to capture, register, and submit new enquiries as leads within the platform through configurable intake channels (e.g. manual entry, web forms, email, or integrations):

- a. Enquiries must be logged as leads with a unique reference number.
- b. The system must support basic lead information capture (e.g. contact details, source, enquiry type).

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 7.1.1.8.1.2. The CRM system must enable end-to-end tracking and management of each lead throughout its full lifecycle, from initial capture and qualification through to conversion, closure, or disqualification.
- 7.1.1.8.1.3. The CRM system must provide configurable notification functionality to support compliance with established Service Level Agreements (SLAs), including automated alerts and reminders based on defined SLA thresholds and events.
- 7.1.1.8.1.4. The CRM system must enforce the lead assignment to resources in a pool/ hunt group to each enquiry at the point of capture, before the enquiry can be submitted or progressed within the system. (Ideally, two resources should have visibility of any single lead).
- 7.1.1.8.1.5. The CRM system must provide structured input mechanisms, including configurable input fields, checkboxes, and free-text fields, to capture the outcomes of desktop analysis in a consistent and auditable manner.
- 7.1.1.8.1.6. The CRM system must support the digitisation of existing manual forms by providing configurable electronic form capabilities that enable structured electronic completion, submission, and processing within the platform.
- 7.1.1.8.1.7. The system must allow manual/paper-based forms to be recreated as electronic forms without custom development, where possible.
- 7.1.1.8.1.8. Digitised forms must support:
 - a. Mandatory and optional fields.
 - b. Validation rules.
 - c. Checkboxes, dropdowns, and free-text fields.
 - d. Electronically completed forms must be:
 - 1. Stored securely.

- 2. Linked to relevant records (e.g. enquiries, leads, opportunities).
- e. Available for reporting and audit purposes.
- f. The digitisation process must support future form changes through configuration.
- g. Completed forms must support workflow progression (e.g. review, approval, escalation).

7.1.1.8.2. Opportunity

7.1.1.8.2.1. The CRM system must support the conversion of qualified leads into opportunities in a controlled and auditable manner, based on defined qualification criteria and business rules:

- a. The system must allow configurable qualification criteria to determine when a lead is eligible for conversion.
- b. Lead-to-opportunity conversion must be retained and transfer all relevant information, including:
 - 1. Contact and organisation details.
 - 2. Interaction history.
 - 3. Supporting documentation.
- c. Analysis outcomes.
- d. Converted opportunities must be assigned a unique identifier and linked back to the originating lead.

7.1.1.8.2.2. Each Opportunity must retain a reference to the originating marketing campaign:

- a. Bidders may indicate whether multiple campaigns can influence a single opportunity and how attribution is handled, (e.g. primary, first-touch, last-touch).

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

b. The following Opportunity fields should be supported and configurable as mandatory:

1. Opportunity Name.
2. Account.
3. Opportunity Owner.
4. Estimated Deal Value.
5. Expected Close Date.
6. Sales Stage.
7. Product(s) / Service(s).

7.1.1.8.2.3. The system must support single-product and multi-product opportunities:

Bidders may propose native product catalogue functionality or configuration options.

7.1.1.8.2.4. The CRM must support a standardised sales pipeline with configurable stages, at a minimum:

- a. Qualification Proposal / Solution, Negotiation, Closed, Won, Closed Lost, etc.
- b. Bidders may describe support for stage-gating rules or mandatory data per stage.

7.1.1.8.2.5. The system must support logging of activities (calls, meetings, emails, tasks) against Opportunities.

7.1.1.8.2.6. The system must support monitoring of time spent in Opportunity stages.

7.1.1.8.2.7. The system must require a reason when an Opportunity is closed as Lost.

7.1.1.8.2.8. Closed Opportunities must be protected from unauthorised modification.

7.1.1.8.2.9. The CRM must support opportunity-based revenue forecasting.

7.1.1.8.2.10. Sales management must be able to report on pipeline value by:

- a. Stage, Owner, Time period and Campaign
 1. The system must support the reporting of revenue linked to marketing campaigns.
 2. Opportunity reports must support analysis of win/loss ratios and pipeline conversion.
 3. The CRM must support opportunity-based revenue forecasting.

7.1.1.9. Sales

7.1.1.9.1. The system must support the creation, distribution, and submission of digital application forms to customers as part of the sales or transactional process. Forms must be accessible electronically (e.g. web or mobile-enabled).

7.1.1.9.2. The system must enable the extraction and secure storage of completed application forms and supporting documentation within the CRM.

7.1.1.9.3. The system must support digital signature functionality for customer applications and related documentation to ensure legal validity and compliance.

7.1.1.9.4. Bidders may describe supported digital signature methods (native or third-party integration) and applicable compliance standards (e.g. audit trails, timestamping).

7.1.1.9.5. The system must enable the extraction and secure storage of completed application forms and supporting documentation within the CRM.

7.1.1.9.6. Bidders may indicate support for document management features such as versioning or document classification.

7.1.1.9.7. The system must automatically link completed forms and documentation to the correct transaction reference, such as:

7.1.1.9.7.1. Opportunity number, Application number, Case or transaction ID.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

7.1.1.9.7.2. Manual re-association of documents should not be required.

7.1.1.9.7.3. However, additional documents must be attachable at any stage of a case or transaction.

7.1.1.9.8. The system must maintain full traceability between:

7.1.1.9.8.1. Customer, Transaction or Opportunity, submitted forms, signed/ authorised, documentation and quotes. This should include notifications and statuses in the workflow.

7.1.1.10. Pipeline Management

7.1.1.10.1. The system must include functionality to identify promising leads and classify or file them within a Work-In-Progress (WIP) pipeline for ongoing management.

7.1.1.10.2. Handover of applications through workflows to the relevant underwriting units (short-term insurance and medium to long-term insurance) once leads are qualified.

7.1.1.10.3. Underwriting teams must be able to access the system to access the documentation associated with projects in the pipeline and be able to update the tickets or provide status updates.

7.1.1.10.4. BDU must be able to track the lead throughout the lifecycle to see the status even once the workflow is handed to STI and Underwriting Units.

7.1.1.11. Reporting and Analytics

7.1.1.11.1. Live dashboards.

7.1.1.11.2. Standard reports.

7.1.1.11.3. Customisable reports (custom report should be doable without development effort).

8. Phase 2 onwards (Phase 2 will be billed on time and material, based on hourly rate)

8.1. All requirements not part of the Phase One are to be agreed with the ECIC. These requirements will be addressed after Phase One is live, ideally in 3-month iterations.

8.2. **Phase 2** will be implemented as part of the enhancement and support hours. Unused hours will be rolled forward until the end of the financial year. No unused hours will be rolled forward beyond 36 months.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 8.3. This phase may include items not explicitly stated as **Phase 1** requirements or standard features for **Phase 1** Modules or as agreed with the ECIC, the items could include all or part of the:

8.3.1. System Integration Requirements

- 8.3.1.1. The system must:

- 8.3.1.1.1. Integrate with corporate email systems for inbound/outbound communication.
- 8.3.1.1.2. API integration with other systems, such as the dtic Industrial Financing Platform (<https://industrialfinancing.co.za>).
- 8.3.1.1.3. Bulk SMS platform if the proposed system does not provide for built-in SMS functionality – The ECIC will subscribe directly with an SMS provider recommended by the bidder.
- 8.3.1.1.4. Social Media integration to enable clients to interact with the ECIC via Social Media platforms such as WhatsApp™, Facebook™, LinkedIn™, etc. Social Media integration may be implemented as either phase one or two – the bidder will be expected to guide.
- 8.3.1.1.5. Email and calendar integration (calendar integration with client self-booking of time slots capability).
- 8.3.1.1.6. MS Power BI™ integration.

8.3.2. Self-Service Capability:

- 8.3.2.1. Chatbot function to assist end users with basic queries and submission of leads.
- 8.3.2.2. The live chat function should be able to automatically provide responses or route to an urgent/ a resource.
- 8.3.2.3. Customer portal to enable customers (customers may include broker representatives or individuals) to create profiles and track their submissions (cases and leads).

8.3.3. Digitalisation of manual forms and storage

- 8.3.3.1. The ECIC currently utilises manual forms, which are completed by applicants and emailed to the ECIC.
- 8.3.3.2. The system must support the digitisation of existing manual forms to enable electronic completion and processing.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

8.3.3.3. The system must store documents and data in a secure location.

8.3.4. **Marketing (Campaigns, Branding and events management)**

8.3.4.1. Advance campaigns and events management capability, excluding the Mobile Lead capture App and basic campaigns management functionality may be considered for deployment as phase two.

8.4. **NOTE TO THE BIDDERS:**

PHASE 2 WILL BE BILLED ON TIME AND MATERIAL, BASED ON HOURLY RATE (PLEASE REFER TO ANNEXURE B FOR PRICING EXAMPLE).

9. **Requirements applicable across all phases:**

9.1. The requirements below apply across all applicable system components and must be considered in design, configuration/development and deployment from the MVP delivery phase through all subsequent releases:

9.1.1. **Privacy and Security Requirements**

9.1.1.1. Single sign-on for internal end users.

9.1.1.2. MFA for both internal and external users.

9.1.1.3. CAPTCHA code to protect public CRM entry points from bots, spam, and fake data.

9.1.1.4. The system must scan all attachments.

9.1.1.5. The bidder/ its OEM/ hosting provider / Vendor must have an active Cyber liability cover.

9.1.1.6. The system must encrypt data in transit and at rest.

9.1.1.7. The provider must have DR capabilities for the system.

9.1.1.8. The provider must have a daily backup schedule for the system.

9.1.1.9. Audit logging must be enabled across the system, including user activities, tickets (leads, enquiries or complaints), login activities, status movements and communication sent out by the system.

9.1.1.10. Role-based access with defined Segregation of Duties Matrix (SoD Matrix - e.g., Complaints Specialist, Supervisor, Admin).

9.1.1.11. The system must be designed to align with POPIA/ GDPR compliance. Critical Personal Information is hashed to make it not usable in the event of a data breach.

9.1.2. **Training and change management:**

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 9.1.2.1. End-user training (Up to 25 users to be trained for Phase One. The Training to include normal end-users, managers and/or super users in line with the segregation of duties matrix).
- 9.1.2.2. ICT personnel training to equip ICT with the knowledge of the system and the ability to perform first-line support (Up to 5 resources to be trained).
- 9.1.2.3. Provide training manuals (digital format).
- 9.1.2.4. Provide a change management and training plan.

9.1.3. **System Testing**

- 9.1.3.1. Test environment to be used for UAT and training.
- 9.1.3.2. System integration testing.
- 9.1.3.3. Unit and end-to-end testing.
- 9.1.3.4. The bidders' team and ECIC Business Analyst to work together to compile test cases.

9.1.4. **Support and Maintenance**

- 9.1.4.1. To include proactive and reactive technical support (level two support and higher) with defined SLA metrics as part of the service. The bidder is expected to indicate what proactive and reactive support will be covered by the support hours, which are not included in the subscription.

The implementation plan for post-Phase One go-live will be agreed with the ECIC in advance and billed on a time-and-materials basis. Unused hours will roll over until the contract ends.

- 9.1.4.2. Provision for post go-live hyper care support to ensure optimal onboarding and system adoption by ensuring technical and functional issues are resolved promptly, and system gaps are identified and remediated to avoid users defaulting to manual processes.

9.1.5. **Reporting and Analytics**

- 9.1.5.1. Provide real-time dashboards and reports on customer interactions and service performance.
- 9.1.5.2. Support Power BI™ (Power BI license to be provided by the ECIC).
- 9.1.5.3. Consists of standard and customisable reports. The standard reports for complaints and leads may include:
 - 9.1.5.3.1. Total received (by period, category, channel, source, etc.).

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

9.1.5.3.2. Turnaround times and SLA performance.

9.1.5.3.3. Escalation statistics.

9.1.5.3.4. Customer satisfaction rates.

9.1.5.3.5. Provide dashboards with real-time metrics.

9.1.5.3.6. Lead conversion rate.

9.1.5.4. The reports must be exportable to MS Excel™ and PDF and must contain a timestamp.

9.1.6. Usability

9.1.6.1. Simple, intuitive user interface.

9.1.6.2. Optimised for desktop and mobile device access.

9.1.7. Performance

9.1.7.1. The system must load windows/ pages, records and dashboards within acceptable response times (e.g., <3 seconds).

9.1.8. Availability

9.1.8.1. The system should be available at least 99% monthly.

9.1.9. Scalability

9.1.9.1. Handle growth in the number of complaints and users over time.

9.1.9.2. Modular-based system, functionality can be added to the base system as required.

9.1.10. Bidders' implementation team

9.1.10.1. The bidder must have a team and be able to provide the necessary skills/roles as and when required in the project. The skills could include at least the following roles (some of the roles can be handled by one person):

9.1.10.1.1. Developers / technical consultants/ functional specialists responsible for configurations and customisation.

9.1.10.1.2. Project Manager responsible for scheduling, management and reporting on the project (the project manager will work closely with the ECIC ICT team).

9.1.10.1.3. Tester to conduct system testing post configuration/ customisation.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

9.1.10.1.4. Business Analyst (BA) to develop test cases with the ECIC BAs and ensure project documentation, including requirements, design documents, and to-be level 5 to 8 processes are up to standard.

9.1.10.1.5. Solutions Architect responsible for the overall system design (considering standard functionality, customisation, configuration, integration and security).

9.1.10.1.6. Trainer/ change management to facilitate end-user training and change management processes.

9.1.10.2. The bidder must have a contingency plan to ensure project continuity should a key resource leave the bidder's employment in the middle of the project.

10. Documentation:

10.1. The appointed bidder will be required to provide the following documents to ECIC:

10.1.1. Statement of work/project initiation documents.

10.1.2. Project Management documents (e.g. project plan, project status reports, etc.).

10.1.3. System architecture documents (including diagrams of the application).

10.1.4. ISAE/ SOC 2 reports will be required annually.

11. Delivery address

11.1. 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

12. Bid/contract conditions

12.1. 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.

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 12.3. 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.

13. Due diligence/site inspection

- 13.1. 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.
- 13.2. 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.
- 13.3. ECIC may identify another bidder using the next highest points obtained in the evaluation phase as stipulated in paragraph 14.1.5, taking into consideration the process followed under paragraphs 13.1 and 13.2.

14. Bid evaluation

- 14.1. The proposals will be evaluated in phases as highlighted below and detailed in paragraphs 14.1.1 and 14.1.6 of this document:

14.1.1. Evaluation Phase One: Pre-qualification and Compliance

Compliance with the requirements of this bid in this evaluation phase, all bidders that fail to provide the required information and documentation will be disqualified from further evaluation.

14.1.2. Evaluation Phase Two: Technical evaluation

In this evaluation phase, bidders are expected to obtain a minimum of 70 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. Refer to Annexure C (Self Evaluation).

14.1.3. Evaluation Phase Three: Functional evaluation

In this evaluation phase, bidders are expected to obtain a minimum of 70 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.

14.1.4. Evaluation Phase Four: Demo 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. Failure to

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation phase.

14.1.5. Evaluation Phase Five: 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 price 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 18, read together with the table in **page 51 (paragraph 4.1)**).

14.1.6. Evaluation Phase Six: Objective criteria

ECIC will apply objective criteria as detailed in paragraph 20.

15. Phase One: Pre-qualification

- 15.1. The bidder must provide proof that they are an approved implementation partner for the proposed CRM system. Acceptable proof may include a letter from the OEM, a valid certificate, confirmation from the OEM's official partner portal, listing on the OEM's official partner directory, an OEM partner number verifiable with the OEM, or any other official OEM-issued confirmation acceptable to the ECIC. Where the proof of partnership has an expiry date, such proof must be valid at the time of submission. ECIC reserves the right to verify the bidder's partner status directly with the OEM.
- 15.2. Where a bidder fails to meet the pre-qualification criteria, the bid will be considered an unacceptable bid and will be disqualified from further evaluation.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

16. Phase Three: Functional

16.1. The proposal submitted by the bidder will be evaluated by the ECIC based on the following criteria and be rated as the factor score over 5 multiplied by the applicable points:

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

Table 1

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		POINTS
		DETAILS/INFORMATION	RATING	
1. Bidders' experience	1.1. The bidder must provide contactable references where the proposed system (CRM) was implemented. Reference letters must not be older than 5 years from the closing date of this bid. Reference letters must be on a company letterhead.	1.1.1. No references provided.	0	25
		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	
2. Security and data protection	2.1. Attestation in the company letterhead and signed by the bidder/ Vendor/ OEM on how the proposed solution meets the POPIA and/or GDPR requirements for protection of personal information, data residency (location of data centres where the data is processed) and information security standards the solution aligns/complies with (e.g. ISO27001, CIS, NIST, etc.).	2.1.1. No letter provided.	0	25
		2.1.2. Letter provided but not signed or on a letterhead.	1	
		2.1.3. Signed letter on a letterhead partially covers the requirements.	2-3	
		2.1.4. Signed letter on a letterhead fully covers the requirements.	4-5	

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		POINTS
		DETAILS/INFORMATION	RATING	
3. Bidder's capacity.	3.1. The bidder must provide curriculum vitae (CVs) and copies of qualifications relevant to this project for all key resources proposed for the project. Each resource must have a minimum of three (3) years' proven individual experience in the designated role within the implementation of CRM systems (for the Project Manager (or equivalent role), the resource must have at least five years experience). Bidders are required to provide a list or indication of the roles to be performed by the proposed resources whom they have provide copies of their CVs and qualifications. a. The proposed resources must collectively cover, at a minimum, the following functional areas: i. Project Manager (or equivalent). ii. Solution Architect (or equivalent). iii. Developer(s) / Functional Consultant(s) / Technical Consultant(s) (or equivalent). iv. Business Analyst (or equivalent). v. Tester / Quality Assurance Specialist (or equivalent).	3.1.1. No CV(s) provided or the CV's provided do not meet the minimum resources required.	0	25
		3.1.2. CVs provided do not clearly indicate for which role they are, and/or do not clearly	1	

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		POINTS
		DETAILS/INFORMATION	RATING	
	vi. Trainer and/or Change Management Specialist (or equivalent). A single resource may perform more than one role; however, the bidder must clearly specify which resource will perform each role. To manage continuity risk, one person cannot perform all the roles.	show relevant experience or a CV of a single person covers all the roles. 3.1.3. CVs provided do not cover all the roles, though relevant experience is clearly defined. 3.1.4. CVs provided cover all the roles, and relevant experience is clearly defined.	 2-3 4-5	
4. Project Methodology and Approach	4.1. Provide a detailed project implementation methodology, including: a. Estimated timelines, assuming a 3-month implementation period for the Phase 1 MVP, covering Leads, Case Management, customer self-service capability, and limited Marketing capability; b. Clearly defined roles, responsibilities, and resource allocation between the Bidder and ECIC; c. Key project milestones and deliverables; d. A skills transfer and knowledge-handover approach; e. A training plan for both end-users and administrators;	4.1.1. Methodology and approach not provided. 4.1.2. The methodology and approach provided do not clearly cover any of the areas as described under the criteria description. 4.1.3. A clear methodology and implementation approach were provided, but one or more of the following were missing or insufficiently detailed: estimated timelines for Phase 1 (MVP), hyper-care support, or a change management plan. 4.1.4. Clear methodology and approach provided covering all areas under the criteria description.	 0 1-2 3 4-5	25

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		POINTS
		DETAILS/INFORMATION	RATING	
	f. A change management plan; g. Post–go-live hyper-care support; and h. Post-implementation support, including proactive and reactive support, with clearly defined Service Level Agreements (SLAs).			
Total				100

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

16.4. Bidders are expected to obtain a minimum of 70 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

17. Phase Four: System Demo and Presentation

17.1. The proposal demonstration and presentation by the bidder will be evaluated by the ECIC based on the following criteria and be rated as the factor score over 5 multiplied by the applicable points:

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

Table 2

Evaluation Criteria	Evaluation Criteria Description	Rating	Points
1. Implementation approach	1.1. The presentation should cover at least: a. Project management b. Training plan c. Change management plan d. Support and maintenance with defined SLAs e. Team structure 1.2. Contingency/ business continuity should be in place if critical team members are unavailable during project implementation.	0-5	40
2. Ease of use	2.1. Using a sample of one of the ECIC requirements (complaints/ leads) the demo should cover: a. Ease of browsing. b. Graphical user interface. c. Configuration (without development expertise).	0-5	20

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

Evaluation Criteria	Evaluation Criteria Description	Rating	Points
3. Reporting	3.1. Using a sample of one of the ECIC requirements (complaints/ leads) the demo should cover: a. Sample reports. b. Sample Dashboards.	0-5	20
4. Security	4.1. Using ECIC's requirements, the demo should cover: a. Access control and segregation of duties. b. Multifactor authentication. c. Protection of personal information. d. Audit logging.	0-5	20
Total			100

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

17.4. 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

18. Phase Five: Preference point system

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

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration;

P_t = Comparative price of bid or offer under consideration; and

P_{min} = Price of the lowest acceptable tender.

18.2. 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.

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

Table 3

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 51 (PARAGRAPH 4.1). IN THE EVENT WHERE A BIDDER MAKES A

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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.]

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

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

19.1. 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 4

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

19.2. Any bid received from a bidder who did not provide the document requested in this paragraph 19 and do not indicate the number of Specific Goals they are claiming for in the SBD6.1 Form, **in the table on page 51 (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).

19.3. Points for Specific Goals will be allocated as indicated in paragraph 18 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 51 (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.

20. Phase Six: Objective criteria

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

20.1.1. 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).

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

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

20.2. 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 20.1.1 to 20.1.3, 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.

21. Standard bidding documents

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

Table 5

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

21.2. 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.

22. Instructions to respondents

22.1. Correspondence

22.1.1. 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.

22.1.2. 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, 30 June 2026. Questions received after this date will not be entertained.

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

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

website (www.ecic.co.za) within three working days after the date indicated in paragraph 22.1.2, on or before Friday, 03 July 2026.

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

22.2. Submission of the proposals

- 22.2.1. 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

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

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

22.2.2.2. 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.

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

- 22.2.3. 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

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

- 22.2.5. 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

23. Timeline of the bid process

- 23.1. The period of validity of the tender and the withdrawal of offers, after the closing date and time, is 120 days, expiring on Wednesday, 11 November 2026. 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.
- 23.2. 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.
- 23.3. The project timeframes of this bid are set out below:

Table 6

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on the Government e-tender portal /ECIC Website	Friday, 12 June 2026
2.	Non-compulsory briefing session	Tuesday, 23 June 2026
3.	Questions relating to the bid from the bidder(s)	Tuesday, 30 June 2026
4.	Response to the questions from the bidders	Friday, 03 July 2026
5.	Bid closing	Tuesday, 14 July 2026
6.	Compliance Evaluation	Friday, 24 July 2026
7.	Technical Evaluation	Friday, 31 July 2026
8.	Functional Evaluation	Friday, 14 August 2026
9.	Demo and presentation	Friday, 04 September 2026
10.	Preference Points	Friday, 18 September 2026
11.	Bid Adjudication	Friday, 09 October 2026

- 23.4. All dates and times in this bid are in South African Standard Time.
- 23.5. 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 23.6. 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.

24. Bid rules

24.1. Awarding a bid

- 24.1.1. ECIC will not award a bid to a bidder:

24.1.1.1. 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.

24.1.1.2. 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.

24.1.1.3. 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.

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

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

- 24.1.2. 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.

- 24.1.3. 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:

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

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 24.1.4. ECIC will verify with the relevant Organ of State to determine if paragraphs 24.1.3.1 and 24.1.3.2 are not applicable.
- 24.1.5. ECIC will assume that, the person contemplated in paragraph 24.1.3 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.
- 24.1.6. ECIC will then recommend to award 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 24.1.3, ECIC will conduct verification as contemplated in paragraphs 24.1.4 and 24.1.5. This step can be performed up to the bidder who achieved the third highest preference points.

24.2. Documents/information required as a condition of award

- 24.2.1. Proof of registration: Valid registration on the National Treasury Central Supplier Database (CSD).
- 24.2.2. Completed and signed Standard Bidding Forms as follows:

Table 7

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

24.3. Sub-contracting

- 24.3.1. 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.
- 24.3.2. 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 24.3.3. 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.

24.4. **ECIC's rights**

- 24.4.1. ECIC reserves the right to:

- 24.4.1.1. 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.
- 24.4.1.2. Cancel or withdraw this bid at any time, as a whole or in part without reasons and without attracting any liability.
- 24.4.1.3. Award this bid to more than one bidder.
- 24.4.1.4. Award this bid in total or part.
- 24.4.1.5. Negotiate with all or some of the shortlisted bidders.
- 24.4.1.6. Not accept the lowest priced bid or award the bid to a bidder other than the highest scoring bidder.
- 24.4.1.7. Conduct site visits at bidder's offices and / or at client sites if so required.
- 24.4.1.8. 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.

24.5. **Contract fees**

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

24.6. **Confidentiality**

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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.

24.7. Other matters

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

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

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

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

24.7.3. 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.

24.8. Disclaimer

24.8.1. 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.

24.8.2. 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.

24.9. Terms of engagement

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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;

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

- 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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)).

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

Annexure C: Self Evaluation

This page has been left blank intentionally. Refer to the attached document titled Annexure C (Self evaluation).

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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:	ECIC04P-2026/27	CLOSING DATE:	14 JULY 2026	CLOSING TIME:	11:00
DESCRIPTION	AUTOMATION OF CRM PROCESSES INCLUDING 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.					

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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:

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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 consortium³ 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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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	

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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.

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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).

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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

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

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**~~

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

~~Where~~

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

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	

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

Annexure D: 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 completed and signed?	
2.	Bidder's capacity		Has the bidder provided curriculum vitae (CVs) and copies of qualifications relevant to this project for all key resources proposed for the project? Does each resource have a minimum of three (3) years' proven individual experience in the designated role within the implementation of CRM systems (for the Project Manager or equivalent role, the resource must have at least five years of experience)? Bidders are required to provide a list or indication of the roles to be performed by the proposed resources who have provided copies of their CVs and qualifications.	
3.	Security and data protection		Has the bidder provided attestation in the company letterhead and signed by the bidder/ Vendor/ OEM on how the proposed solution meets the POPIA and/or GDPR requirements for protection of personal information, data residency (location of data centres where the data is processed) and information security standards the solution aligns/complies with (e.g. ISO27001, CIS, NIST, etc.)?	
4.	Proof of OEM partnership		Did the bidder provide proof that they are an approved implementation partner for the proposed CRM system? Acceptable proof may include a letter from the OEM, a valid certificate, confirmation from the OEM's official partner portal, listing on the OEM's official partner directory, an OEM partner number verifiable with the OEM, or any other official OEM-issued confirmation acceptable to the ECIC. Where the proof of partnership has an expiry date, such proof must be valid at the time of submission. ECIC reserves the right to verify the bidder's partner status directly with the OEM.	
5.	Bidders' experience		Has the bidder provided contactable references where the proposed system (CRM) was implemented?	

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/ NO
			Reference letters must not be older than 5 years from the closing date of this bid. Reference letters must be on a company letterhead.	
6.	Project Methodology and Approach		Did the bidder provide a detailed project implementation methodology? The Methodology and Approach must include: • Estimated timelines, assuming a 3-month implementation period for the Phase 1 MVP, covering Leads, Case Management, customer self-service capability, and limited Marketing capability; • Clearly defined roles, responsibilities, and resource allocation between the Bidder and ECIC; • Key project milestones and deliverables; • A skills transfer and knowledge-handover approach; • A training plan for both end-users and administrators; • A change management plan; • Post-go-live hyper-care support; and • Post-implementation support, including proactive and reactive support, with clearly defined Service Level Agreements (SLAs).	
7.	SBD 4	Declaration of Interest	Is the form duly completed and signed?	
8.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly completed, Specific Goals points claimed, and form signed? Refer to the table in page 51 (paragraph 4.1)	
9.	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.	
10.	CSD Report or MAAA Number			

REQUEST FOR PROPOSAL: AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS

Terms of Reference

ITEM	DOCUMENT REFERENCE	ACTION TO BE TAKEN	YES/NO
11.	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	