REQUEST FOR PROPOSAL:

APPOINTMENT OF A SERVICE PROVIDER FOR THE IMPLEMENTATION AND BUILD OF THE EPPF INTERGRATION LAYER PLATFORM FOR A PERIOD 18 MONTHS

Closing Date: 18 AUGUST 2026

Time: 16:00 PM

1. REQUEST FOR PROPOSAL

EPPF ("the Fund") herewith invites proposals from interested, suitable service providers to submit responses to this Request for Proposal (RFP) for the: **Implementation and Build of the Integration Layer Platform, for an initial period of 18 Months.**

2. PURPOSE OF THE DOCUMENT

The purpose of this RFP document is to provide broad details relevant to the services required and is not intended to provide a detailed overview of every action required.

3. OVERVIEW

The EPPF is a self-administered Defined Benefit (DB) pension fund, regulated by the Financial Sector Conduct Authority (FSCA). The EPPF, as an organisation, is responsible for providing benefits administration and investment management services to the pension fund of Eskom Holdings SOC Ltd, its subsidiaries and participating employers. The Fund provides retirement, withdrawal, death, and ill-health benefits to members, pensioners, and their dependents.

The EPPF's core business activities are Pension Fund Administration and Investment Management. The core functions are supported by the Finance, Governance & Assurance, Office of the CE, Human Capital, and Information Technology Departments. The EPPF has assets under management of more than **R 230,9 billion** and membership comprises of **40 757** active contributing members, and **40 450** pensioners and other categories as of **30 July 2025**.

The EPPF's vision is to become the most admired pension fund by its peers and members, and its mission is to be a member-centric pension fund. The Fund's strategic objectives, which would enable it to fulfil its mission, are defined under **five (5) pillars**, representing critical strategic focus areas as noted below.

Strategic Intent and Position

The EPPF has been a **Defined Benefit (DB)** administrator since its inception, and it is a leading defined benefit pension fund in South Africa, known for its robust administration and a well-defined promise to its members. EPPF has embarked on a strategic journey to introduce new products and services aimed at diversifying the Fund's offerings, potentially attracting a broader membership base and enhancing the employers' value propositions to their employees.
To align to this expansion while preserving and maturing member experience, accelerated technological advancements and platforms are required to transform the business model and demand for enhanced IT agility.

In support of the Fund **business** and **technology** strategy, EPPF would like to appoint a partner to provide the implementation and build of the **Integration Layer Platform**, to create a flexible, secure, and scalable digital backbone that connects systems, improves operational efficiency, accelerates innovation, ensures compliance, and enhances customer experience.

4. RFP RESPONSE GUIDELINES

4.1. Point of Contact

This RFP is issued on an **open tender notice** format with a definite closing date and time.

Respondents are required to submit their responses in expansive detail and on time to qualify for consideration of their responses.

During the response time, the central point for all queries relevant to the provision of background information and points of clarity relevant to this RFP, will be managed through a central mailbox. In the interest of all parties concerned, all queries must be submitted in writing only and responses to queries or points of clarity will be consolidated and shared with all the interested suppliers in the tender process by the Procurement Office.

The electronic mail address for **queries** is ProcurementOffice@eppf.co.za . No telephonic or verbal queries will be entertained.

After the distribution of this RFP to the market, a **briefing session** will be conducted with all the invited suppliers to provide further information and address questions relevant to the RFP.

The **non-compulsory briefing session** for the suppliers is scheduled for **12:00 on 29 July 2026 via** Microsoft Teams. The formal meeting invite will be sent from the Procurement Office ProcurementOffice@eppf.co.za by **28 July 2026 at 12h00** to all the interested suppliers. Attendance is limited to two (2) persons per supplier.

Email Subject for all communication relating to this RFP is **Implementation of EPPF Integration Layer Platform.**

Respondents must not contact any of the Fund's Board members, executives, consultants, or staff to discuss matters related to this RFP or the RFP process. Discussion of this RFP with any person within or associated with the Fund other than the designated contact email as above will result in the disqualification of that respondent from the process.

4.2. RFP Process and Submission Procedure

The Fund will review proposals at its discretion against a set of pre-defined criteria and will rate each proposal on its ability to satisfy the requirements stated in this RFP.

In the event that a preferred supplier is selected, such service provider will be formally notified. A formal Agreement will be entered into between the Fund and the successful service provider detailing issues such as the scope of work, remuneration structure and validity of the term of the contract.

Potential service providers are requested to be mindful of the time allowed for responses, the closing date and time, and the delivery address for proposals and must note that late or incomplete submissions will not be considered.

The RFP must be submitted with the necessary supporting details and must at least provide the information requested in this RFP.

The Fund reserves the right to consider any proposal in its entirety or partially and may appoint more than one service provider or no service provider at all. The Fund's decision is final, and no correspondence will be entered into.

4.3. Submission Date, Time, and Address

The closing date for submission of proposals at the delivery address indicated below is **18 August 2026 16h00 pm**

RFPs must be submitted electronically to ProcurementOffice@eppf.co.za .

All proposals must reach the allocated email address on or before the closing time. It remains the responsibility of the respondents to ensure that their proposals reach the Fund before the closing date and time.

Respondents are allowed to send large files via WeTransfer (or other tools) and must ensure that the hyperlinks provided are fully functional. All documents must be provided in Adobe PDF.

Proposals may not be faxed, or hand delivered, and proposals received by any other means other than the designated email address, will not be considered and will be rendered invalid.

4.4. RFP Timelines

The timelines for the RFP process are as follows:

Activity	**Due Date**
Tender Issuing	22 July 2026
Non-Compulsory Briefing Session	29 July 2026,12h00pm
Deadline for clarification questions	07 August 2026, 16h00pm

Final response to clarification questions	11 August 2026
Closing date for submissions	18 August 2026, 16h00pm
Solution Demonstration, Presentations and Due Diligence	03 – 04 September 2026

The briefing session is non-compulsory, and all bidders will not be disqualified for non-attendance of the briefing session. To ensure completeness and accuracy of the tender responses, all interested service providers are encouraged to attend the briefing session

Please note that the above timelines are indicative and that the Fund reserves the right to change these timelines. Respondents will be advised of any changes and / or notices via email.

4.5. RFP Process Requirements

The following minimum requirements will be applied to the RFP process:

i. Responses received after the closing date and time will be considered late and will not be accepted. If a response is considered late, it will be returned unread to the sender.

ii. All responses must be submitted in full on or before the closing time. The Fund will not allow additions and/or amendments to any response to be submitted after the closing date and time and will not receive submissions in separate parts.

iii. Responses may be withdrawn in writing by a respondent prior to the closing date and time.

iv. All enquiries relevant to the RFP may only be submitted to the indicated point of contact and in writing. Telephonic and/or verbal enquiries will not be entertained.

v. During this RFP process, respondents may acquire confidential information relating to the Fund's business, projects and/or customers. Respondents are required to always keep this information strictly confidential (even after the RFP process has been completed) and may not use or attempt to use or allow such information to be used for personal gain or the gain of any other person or institution.

vi. Respondents may not disclose such confidential information to any third party, but to the extent that such disclosure may be necessary for the submission of a formal proposal, must approach the Fund for prior approval to share the information with a third party. This does not apply to information that must, by law, be disclosed or becomes available to and known by the public due to no fault on the part of the respondents.

vii. Respondents must comply with the highest ethical standards in order to promote mutual trust and an environment where business can be conducted with integrity, in a fair and reasonable manner.

viii. Proposals submitted to the Fund must remain valid for a minimum period of 90 days from the closing date.

ix. Respondents will be held to their proposals as submitted. The Fund reserves the right to negotiate the modification of a proposal with the successful respondent in whole or in part.

x. Agreements reached after such modifications with the successful respondent, or parts thereof, and accepted by the Fund will form part of the contract.

xi. Each proposal will be evaluated for general conformity to specifications and the Respondents must provide curricula vitae of all key personnel they propose for execution of the scope of work, with clearly defined fields of expertise, functions and responsibilities.

xii. In general, respondents must indicate the experience and field/s of expertise of their companies and must specifically demonstrate their experience in similar assignments and an understanding of the services required.

xiii. Respondents are responsible for any and all costs and liabilities incurred in responding to this RFP. The Fund will not be responsible for any costs whatsoever or howsoever arising.

xiv. The Fund reserves the right to withdraw this RFP for any reason and at any time without incurring any cost or liability.

xv. The Fund reserves the right to withdraw, at any stage of this process, amend or cancel this RFP, reject or not accept any or all proposals, obtain any information from any lawful source regarding past business history and practices of the respondent, and to take any such information into consideration in the evaluation process.

xvi. The Fund does not have to explain acceptance or rejection of any specific service provider and the Fund's decision is final and binding, no correspondence will be entered into.

4.6. Compliance requirement: structure of responses

The structure of proposals is as follows:

4.6.1. Proposals must be electronically generated and signed by the individual(s) legally authorised to bind the respondent. The electronic copies of the RFP proposal and/or examples of work must be provided in Adobe Reader Portable Document Format (PDF), free of any viruses or malicious ware.

4.6.2. Legibility, clarity and completeness are essential.

4.6.3. Responses must be prepared as simply as possible, providing a straight-forward, concise description of the interested parties and the capabilities available to satisfy the requirements of the RFP.

4.6.4. The RFP response must be presented in the following format:

Section	Title
1.	Executive Summary of Proposal
2.	Company background and track record
3.	Proposed team members for the project and their credentials
4.	Proposed solutions and services
5.	Key Deliverables and Project Methodology
6.	Pricing Structure
7.	References (minimum of three references to be included)
8.	B-BBEE
9.	Supporting documentation

4.6.5. **Failure to comply with paragraphs 4.6.1 to 4.6.4 will result in the relevant response being disqualified.**

4.7. Evaluation Criteria

Respondents will be evaluated according to the extent to which they are able to fulfil the requirements of the Fund. Evaluation criteria will place emphasis on the following areas:

Stage 1:

Criteria	Percentage
B-BBEE	20%
Pricing	20%
Functional Ability	55%
Data Privacy, Compliance and Management (Governance)	5%
Total	**100%**

Stage 2 (Shortlisted Bidders only)

Solution Demonstration, Presentation, and Due Diligence: 100%

Respondents must be well-established entities with expertise in providing the relevant **infrastructure services and solutions, integration layer platform and related services**, utilising best practice methodology and approach.

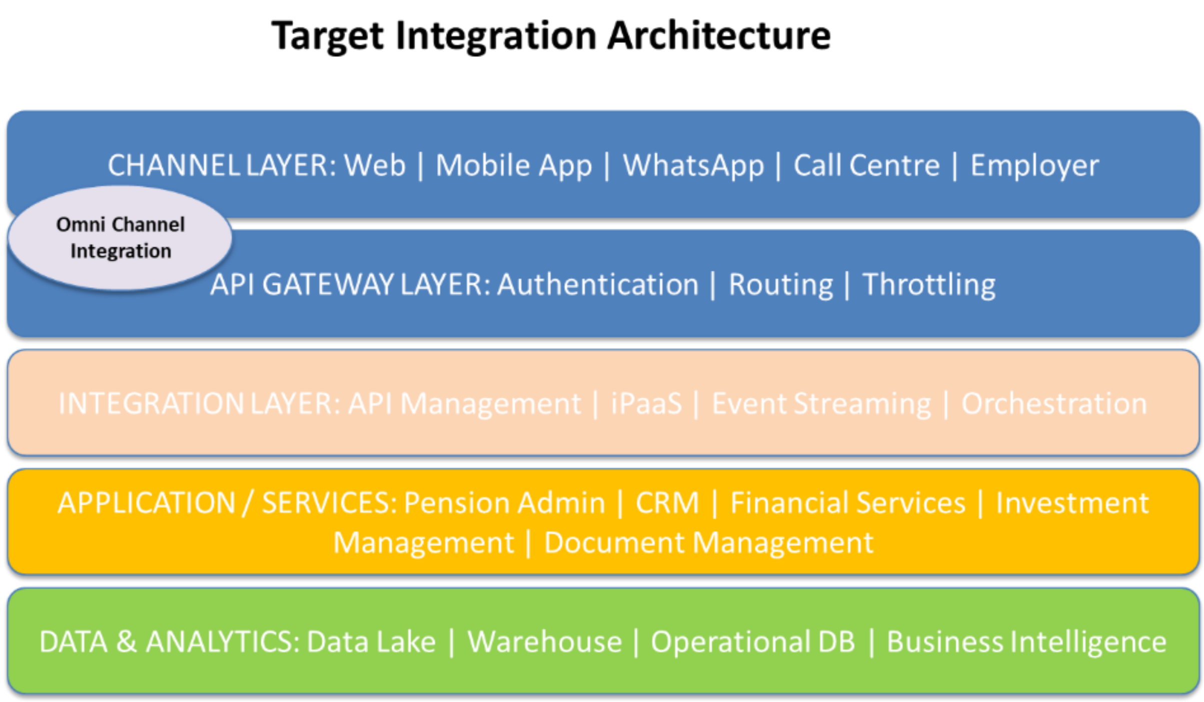
Respondents are required to indicate the **period** they have been in operation in this specific environment and must include supporting documents in respect of such specific expertise. We will also require respondents to stipulate their **experience** with implementing Integration layer platforms and strategy for pension/ retirement funds and/or financial services entities.

Respondents must also provide supporting documentation relevant to issues such as the ownership of the business, management structure, and B-BBEE credentials in the format indicated in this RFP document.

Evaluation criteria will emphasize the following areas:

4.7.1 Target Integration Architecture Model

The proposed integration layer platform should enable the Fund towards achieving the **Targeted Architecture Model** depicted below (at minimal), which is a future-state blueprint that defines how the Fund business, data, application, and technology landscape should look after a transformation



4.7.2 Functional Ability

The EPPF **Integration layer** is critical for connecting internal systems, external partners, and digital channels, to ensure that all systems (old and new) work securely, efficiently, and in real time. To be effective, it should include several key components and capabilities:

- **API Management**

- Secure exposure of services via APIs to enable open services, partner integration, and mobile/web applications and providing a gateway for:
  - Authentication & authorization
  - Rate limiting and throttling
  - Monitoring and analytics

- **Middleware / Enterprise Service Bus (ESB)**

- Handles communication between legacy systems and modern applications, and to ensure that systems with different formats can communicate seamlessly.

- **Event-Driven Architecture (EDA)**

- Supports asynchronous communication using events to enable real-time processing and loose coupling between systems for detection capabilities, contribution collections, and payments processing

- **Data Integration & Transformation**

- ETL/ELT capabilities (Extract, Transform, Load) , in real-time and batch data pipelines and support data mapping and enrichment to ensure consistent, accurate data across systems.

- **Service Orchestration**

- Coordinates multiple services into business processes, workflow engines for automation and supports complex transactions across systems

- **Microservices Support**

- Enables modular, scalable services, containerization and independent deployment and scaling to improve agility and system resilience.

Service providers must submit a detailed technical response with the capability statement covering the following Fund requirements:

- A minimum of **5 years** demonstrated track record and experience of implementing infrastructure services and solutions, integration layer platform and related services with a focus on pension/ retirement funds or financial institutions.

- Demonstrating your company's ability, skills and capabilities to deliver the Fund requirements as per the target integration architecture.

- Project methodology and approach, milestones, and key deliverables throughout the engagement period, including training and knowledge transfer.

- Architecture overview of the proposed platforms/solutions/systems to demonstrate adoption of modern new technologies, systems and integrations, and demonstrate that integration with the existing Fund platforms and channels will be achievable (Pension administration, Web portal, Mobile app, WhatsApp, data lake, CRM, accounting and investment platform).

- Overview of the proposed platform and solutions, and compliance to the following business, technical and functional requirements:

BRS No.	Requirement Description
General	
BR1	The solution should be scalable to cater for the Fund's transaction volumes.
BR1.1	The solution should have a reference architecture, high-level features, and components relevant to a financial services / retirement fund administration context.
BR1.2	The service provider should have prior deployment experience in financial services organisations, ideally retirement fund administration, pension administration.
Architectural	
BR2	The solution must support cloud-based deployment model.

BRS No.	Requirement Description
BR2.1	The solution should allow for scaling without impacting production services.
BR2.2	The solution should allow allocation of additional resources to specific high-priority flows during peak periods, including the capability to throttle transactions per interface.
Orchestration	
BR3	The solution should be able to orchestrate a defined sequence of calls across multiple integration services/flows built on the platform, invoking each in order and passing data between them.
BR3.1	The solution should support conditional branching within an orchestrated sequence, directing flow to different downstream integration services based on the outcome of a prior step.
BR3.2	The solution should support parallel invocation of multiple integration services where steps are independent, with the ability to join/aggregate their results before proceeding.
BR3.3	The solution should maintain and persist execution state for an orchestrated sequence spanning longer than a single request/response cycle, resuming correctly if a downstream service is temporarily unavailable.
BR3.4	The solution should provide retry and error-handling policies configurable per step within an orchestrated sequence, independent of the retry policy of any individual integration service.
Routing	
BR4	The solution should support content-based, header-based, message-type based routing, directing a message to a destination system.
BR4.1	The solution should support rule-driven dynamic routing, where routing destinations and conditions are configurable by Fund staff without requiring a code change or redeployment.
BR4.2	The solution should support multi-destination / fan-out routing, sending a single inbound message to multiple downstream consumers where required.
Integrations and Connectivity	
BR5	The solution must be able to integrate with the standard databases at no additional licensing cost.
BR5.1	The solution should support database polling and change-data-capture (CDC) where a source system exposes no other integration mechanism.
BR5.2	The solution must support integration with standard message queuing middleware (e.g. IBM MQ, RabbitMQ, ActiveMQ, Azure Service Bus) for both sending and receiving messages.

BRS No.	Requirement Description
BR5.3	The solution should support the JMS (Java Message Service) standard for queue and topic-based messaging where applicable.
BR5.4	The solution should support both point-to-point queue -based and real time publish/subscribe topic-based messaging.
BR5.5	The solution must support guaranteed message delivery and persistence, such that a temporarily unavailable consumer does not result in message or data loss.
BR5.6	The solution should support transactional messaging across different systems.
BR5.7	The solution should provide monitoring of queue depth, consumer lag, and dead-letter queue volume as part of its standard operational dashboard.
BR5.8	The solution should support Managed File Transfer (MFT) with encryption, for systems that may expose only file-based interfaces.
BR5.9	The solution should support operating system file service polling for file-based integration.
BR5.10	The solution must support SOAP-based web services.
BR5.11	The solution must support RESTful web services.
BR5.12	The solution must support SMTP, FTP, SFTP, JMS and other communication protocols.
BR5.13	The solution should support webhook-style inbound
BR5.14	The solution should support HTTPS and SSL/TLS
BR5.15	The solution should include an integrated batch scheduler for batch integrations.
BR5.16	The solution should support two phase commit/XA transactions across multiple data stores.
BR5.17	The solution should support asynchronous and synchronous communication e.g., Polling, Batch, Queuing, Request/Reply, Remote Procedure, File Transfer Protocol (FTP) and (FTPS)
BR5.18	The solution platform should natively support the Model Context Protocol (MCP) standard, acting as an MCP host or server to streamline tool discovery and data access for autonomous agents.
BR5.19	The platform should have token-limit and transaction-rate capabilities in its runtime engine.
BR5.20	The platform should have in-memory caching mechanisms to store stateful data across different integration flows.

BRS No.	Requirement Description
Connectors & Adaptors	
BR6	The solution should provide native connectors for common enterprise systems (e.g. Microsoft Dynamics 365, SharePoint, generic SQL/JDBC/ODBC databases etc).
BR6.1	The solution should provide a pre-built e-mail adapter (e.g. for Microsoft Exchange/Microsoft 365).
API Management	
BR7	The solution should include, or natively integrate with, an API gateway providing authentication (OAuth2/OIDC, JWT), rate limiting, versioning, and a developer portal.
Data and Transformations	
BR8	The solution should support common data format and transformation standards, including XML, JSON, XSD, XSLT, and XPath
BR8.1	The solution should support message/data transformation with the ability to perform lookups against external services or internal reference tables during transformation
BR8.2	The solution should support data validation rules (mandatory field checks, format checks, cross-field consistency checks) applied to inbound and outbound payloads
BR8.3	The solution should support base64 field level encoding and custom data formats
Development, Lifecycle, and Governance Tooling	
BR9	The solution should provide a graphical, drag-and-drop design environment for building integration flows.
BR9.1	The solution should support source/version control integration (e.g. Git).
BR9.2	The solution should provide testing tools including unit testing and simulators/stubs
BR9.3	The solution should provide a service repository, with both design-time and runtime governance of integration services.
BR9.4	The platform should have a design-time AI engine that assist developers in integration flows, code snippets, data mappings and documentation generation etc
BR9.5	The solution should support deployment of custom components written in different development languages e.g., C/C++/Java/.Net etc

BRS No.	Requirement Description
Operations and administration	
BR10	The solution should provide centralised monitoring and management of all APIs, services and integration flows.
BR10.1	The solution should allow patches to be applied to production without impacting runtime services where the majority of services must remain available.
BR10.2	The solution should provide a structured exception management capability, including a reviewable exceptions with audit tail.
BR10.3	The solution should provide a reporting dashboard for messaging activity and infrastructure performance over a given period.
Security	
BR11	The solution must provide security, logging, and monitoring capabilities.
BR11.1	The solution must integrate with the Fund’s identity providers and multi factor authentication (MFA) for central user account management and to enable single sign-on (SSO).
BR11.2	The solution must employ role-based access control with least-privilege principles for all administrative and developer access.
BR11.3	The solution must encrypt data at and in transit.
BR11.4	The solution must support a credentials/secrets vault
BR11.5	The solution must support data residency requirements consistent with POPIA, with the supplier confirming available hosting regions.
BR11.6	The solution must be able to integrate with the Fund’s SIEM tooling to ingest security events and alerts.
BR11.7	The solution’s interfaces/nodes must be capable of static application security testing (SAST) prior to production deployment, with critical and high vulnerabilities remediated before go-live.
Disaster Recovery	
BR12	The solution must have a tested disaster recovery plan in place before handover.

4.7.3. Fee Structure (Pricing)

- The service provider should provide a comprehensive Cost/Fee proposal, addressing all engagements costs from initiation, implementation, integration, testing, training, go-live and post go-live activities (i.e. training and skills transfer)

- Respondents must provide full details of pricing models and assumptions made in the pricing. All prices are to be quoted in South African Rands (ZAR) and must include VAT where applicable.

- Proposals must be valid for at least **90 days** from the closing date of the RFP. If prices are subject to exchange rate fluctuations, respondents must indicate the assumed rates and conditions about exchange rate fluctuations.

- All prices must be disclosed comprehensively.

- Please submit the pricing fee/schedule as presented in the table below for the Implementation and build of the EPPF Integration layer platform:

No.	Item description	Estimated No of Users/Hours	Rate Per User/Hour (Inc VAT)	Total Estimated Cost (Inc VAT)
1	**Annual Software Licensing for 18 Months** • Platform software and licensing	Suppliers to provide	Suppliers to provide	Suppliers to provide
2	**Implementation Cost (Once-off)** • Deployment of Resources on the project • Project management team to work closely with the Fund's internal resources.	Supplier to provide	Suppliers to provide	Suppliers to provide

3	**Training and Skills Transfer (3 Months)**	20 Key Stakeholders	Suppliers to provide	Suppliers to provide
4	**Other Costs (if applicable)**			
Total Price Incl. VAT (ZAR)				

- Note - To facilitate like-for-like comparison, bidders must submit pricing strictly by the pricing table above and not utilise a different format. Use of a format different from the pricing format provided may render your submission disqualified.

- Kindly indicate hourly rates for consultancy per resource level (e.g., Senior Developer, Application Analyst, Test Lead, Project Manager, etc.) – through a rate card **or** by completing the table below.

No.	Level of resources	Proposed Rate (Inc VAT)	No.	Level of resources
1.	E.g. Developer			

4.7.4. B-BBEE

The Fund is committed to advancing the objectives of B-BBEE and details of the service provider's B-BBEE credentials, supported by a copy of a rating certificate from a South African National Accreditation System (SANAS) accredited rating institution or an affidavit wherever applicable, with details of the relevant company profile must be provided.

As a minimum, specific reference must be made to:

- Ownership structure and shareholding.
- Board representation.
- Executive / Operational Management structure;
- Representation of Black people and women in the proposed team,

- Secondary B-BBEE initiatives, such as procurement from B-BBEE suppliers and other initiatives.
- These details must be clearly stated in the order requested and with the headings as above. Minimum B-BBEE Level 4.

4.8. References

The Fund will require references from established companies where the respondents conducted similar consulting services. The Fund therefore requires information regarding contactable clients. Respondents must include references from at **least three clients** in South Africa where they have implementing **infrastructure services and solutions**, **integration layer platform and associated services,** in the following format:

- Client name.
- Contact details (telephone and email address).
- Client representative.
- Service description (scope of services delivered and total contract value thereof).

When providing information regarding references it is accepted that the respondent has cleared with the referee that the client can be contacted directly by the Fund or its consultants.

5. RFP SPECIFICATIONS

5.1. Purpose

EPPF seeks to contract with suitably qualified service provider for the implementation and build of an **Integration Layer Platform** to enable the Fund to effectively deliver its business, technology and digital strategy.

5.2. Scope of work

In support of the Fund **business** and **technology** strategy, EPPF would like to appoint a partner to provide the implementation and build of the **Integration Layer Platform**, to create a flexible, secure, and scalable digital backbone that connects systems, improves operational efficiency, accelerates innovation, ensures compliance, and enhances customer experience

- **PLATFORM SOFTWARE & LICENSING (18 MONTHS)**
  - Provision of software and licensing for the platform

- **IMPLEMENTATION FEE (ONCE OFF)**
  - Deployment of resources for the development, implementation and configuration of the platform, including project management

- **TRAINING (3 MONTHS)**
  - Training and skills transfer for 20 key stakeholders

ESTIMATED CONTRACT PERIOD – 18 Months

ESTIMATED CONTRACT START DATE – 01 OCTOBER 2026

5.3. Acceptance Criteria

The successful service providers' Solution and services will be considered accepted by the Fund when:

- The Solution provided is fit for purpose.
- The requirements have been met and satisfy the need/requirements provided as set out in this Scope of Work.
- All applicable standards have been complied with.

6. REQUIRED SUBMISSIONS

6.1. Declaration

Respondents must, on the official letterhead of the company submitting the response, declare that:

a. the information provided in all documentation is true and correct.

b. the signatory of the tender document is duly authorised to do so by means of their role in the company, a special or general resolution of the company responding, and

c. undertake that all information gained from the EPPF through this RFP document or from any other interaction relevant to this RFP will remain confidential.

6.2. Company details and stability

Please provide a response to each of the following questions:

a. How long the company has been in operation within its current specific environment of providing infrastructure services and solutions, integration layer platform and related services

b. The nature of the business, paying particular attention to core activities.

c. The company's summarised value proposition to its clients.

d. The company's registration number and supporting registration documents.

e. The company's overall organisational structure and key resources within this structure that will be dedicated to the EPPF.

f. If the response to the RFP is made as part of a joint venture with another business entity, details of the commercial relationships between the parties making up the consortium / joint venture/partnership. In addition, provide the following information:

- Copy of the Joint Venture Agreement

- Entity(ies) that will be guaranteeing contract performance.
- Date of Joint Venture formation, if applicable.
- The name of the lead / primary contractor; and
- Details regarding the nature of the agreement between the Joint Venture Partners including the proposed percentage division of work between the constituent members. Each party to the joint venture, if that party is a subsidiary company, is required to give details of the extent to which the holding company and related subsidiaries and associates are prepared to provide guarantees.
- The B-BBEE rating will be the average of the companies' individual ratings, weighted according to their proportionate share in the Joint Venture.

6.3. Local Presence and Experience

i. Provide details of the head office location.
ii. If the head office location is not in South Africa, also provide details of local company offices, support, and visibility.
iii. Provide the year of establishment of the South African business and the number of employees currently employed.
iv. Provide instances of the company's experience in optimizing and implementing integration layer platforms and related solutions previously.
v. Provide evidence of the company's experience in engaging with clients at executive and board level.

6.4. Implementation Plan

Respondents are required to detail their approach to the implementation , and build of the integration layer and related services, linked to the scope of work.

6.5. Approach

i. Describe how your organisation would approach this engagement, and methodologies to be adopted. Please detail the phases, activities and milestones involved.

ii. Describe how and when the required capabilities and resources from your organisation will be deployed.
iii. Describe the resources required from the Fund.

6.6. Supporting Documentation

Respondents must include the following supporting documentation within their proposals:

Mandatory documents :

- A detailed statement of the company's B-BBEE credentials as required in the above, supported by a rating certificate from a SANAS accredited rating institution or a B-BBEE affidavit.
- Recent audited Financial Statement of the specific entity that will be submitting the proposal, and if successful, contracting with the Fund. Group or any other entity's Annual Financial Statements will not be accepted. Respondents who are not required by law to have audited financial statements must include a letter signed by an authorised official confirming that the respondent is not required by law to have audited financial statements and accordingly, is unable to provide same. Failure to submit a complete set of financial statements i.e. all pages or redaction/blanking out or omission of any portion of the financial statements will render the submission incomplete and will lead to disqualification at the evaluation stage.
- Respondents must complete the EPPF POPIA Self Compliance Forms (EPPF Operator Privacy Due Diligence Form and Operator Privacy Compliance Self-Assessment Form).

- In the case of a Joint Venture the above-mentioned documentation, except for the B-BBEE credentials, need only be supplied for the primary entity.

Administrative Documentations.

- Declaration (Formal letter) as per (6.1) under Further required submissions.

- Certified copies of CIPC company registration documentation. In the case of respondents who are not companies as envisaged in the Companies Act of 2008, equivalent founding documents must be submitted.
- A valid Tax Clearance Certificate and/or PIN indicating good standing with the South African Revenue Services (SARS).

Respondents will be disqualified from the RFP process if any of the details and/or mandatory documents listed in 6.6 above are not submitted.

7. Appendix A – Terms of Business

1. Background

The Fund wishes to appoint a suitable service provider for the **implementation, and build of Integration Layer Platform**

By submitting a response to the RFP sent out by the Fund, a respondent automatically undertakes to be bound by, and agrees to, the conditions set out in this entire document.

Respondents that do not consider themselves bound by the provisions of this entire document should not respond to the RFP, as submission of a response pre-supposes agreement to the terms of this agreement.

2. Terms of Business

The Fund hereby sets out the Terms of Business, and the respondent hereby accepts the conditions that will apply to the work to be done by the service provider appointed in terms of the RFP detailed in this agreement.

Once signed by both parties, these Terms of Business will form part of the basis of a suitable Agreement between the Fund and the successful service provider.

An additional agreement detailing the services to be rendered will be entered into. These Terms of Business will establish the basis of such an agreement to provide the services as outlined in the RFP and will serve to explain the conditions under which the appointment of the preferred service provider is made but may also be extended in the Agreement to include other matters not necessarily addressed in this RFP.

3. The Services to be Provided

3.1. The service provider will provide the services described in the RFP, and at the location(s) to be set out in the Agreement. The services described in the RFP are not an exhaustive list of all services to be performed by the successful respondent.

Where the Agreement refers to services to be performed, this means that the service provider will provide the Fund with the Services and will be responsible for the management and control of the services and the quality of any deliverables listed in or referred to in the Agreement.

Where the Agreement refers to Services to assist the successful service provider this means that the Fund will use reasonable skill and care, as specified, to assist the service provider with its work, but the service provider will be responsible for the overall management and control of the Services and for the results to be achieved from using the Services.

3.2. The Service Provider's Staff

Where individual members of the service provider's staff (including partners and directors) are named in the Agreement the service provider will make every reasonable effort to ensure that the named individual(s) are available to support its work for the Fund stated in the Agreement.

Where the service provider considers changes in its named staff necessary or appropriate, for the reason of, inter alia, resignation, relocation, training or illness, the service provider may make the changes after giving the Fund reasonable notice and will provide the Fund with details of replacement staff.

3.3. Contract Management

Both parties may designate a contact person that will be responsible for managing all issues relating to the performance of the Agreement.

3.4. Deliverables

3.4.1. Preparation and Delivery

The Fund will incorporate the deliverables listed or referred to in the RFP into the Agreement to be signed with the preferred service provider.

4. Fees and Payment

4.1. Payment of Services

The Fund agrees to pay for the Services as set out in the Agreement. All invoices will be payable within thirty days from the date of receipt thereof. The project plan will clearly set out the deliverables, milestone dates, and where applicable payment milestone dates. Once the project plan has been agreed upon with the successful service provider it will be incorporated in the awarded agreement.

5. Risks, Assumptions, Dependencies & Exclusions (RADE)

The service provider to provide comprehensive risk analysis, including assumptions made, dependencies and exclusions in line with the start of the awarded agreement, and risk management will be performed throughout the life cycle of the awarded agreement.

6. Term, Suspension and Termination

6.1. Duration of Contract

The Agreement will apply from the Commencement Date stated, or where no Commencement Date is specified, from the date of signature of the Agreement by both parties. The Agreement will continue until all the Services and deliverables have been provided unless it is terminated earlier in accordance with the terms set out below.

6.2. Termination of the Contract

Unless stated otherwise in the Agreement, the Contract may be terminated by either party at any time by giving the other party no less than 30 days written notice. The Fund however reserves the right to terminate the Agreement by giving 24 hours written notice.

Where the Contract is terminated in this way the Fund will pay the service provider for all Services provided and completed up to the date of termination.

6.3. Termination for Breach of Contract

The Agreement may be terminated by either party by written notice with immediate effect if the other commits a material breach of any term of the Agreement that is not remedied within 10 days of dispatch of a written request to remedy the same, where such breach is capable of being remedied.

6.4. Termination for Insolvency

The Agreement may be terminated by either party by written notice in the event that the other party is unable to pay its debts or has been placed under administration, judicial manager, liquidator or similar person or officer appointed or compromises generally with its creditors or ceases for any other reason to carry on business or in the reasonable opinion of the other party any of these events appears likely.

7. Confidentiality and Conflicts of Interests

7.1. By signing the Agreement, each party is under a professional obligation not to disclose to a third party any information confidential to the other party. Similarly, reports by the service provider are for the use of the Fund alone and may not be disclosed to third parties without the Fund's prior written consent.

7.2. Notwithstanding 6.1 above, either party will be entitled to disclose confidential information of the other to a third party to the extent required by law or where the said information is already known to the public due to no fault on the other party, provided that in the former case (and without breaching any legal requirement), where reasonably practicable not less than five business days' notice in writing is first given to the other party.

7.3. Respondents are required to declare any relationship (family, friend, other) between themselves, and any person employed by the EPPF who may be involved with the evaluation and or adjudication of this RFP. Such declarations may be included as part of the Respondent's proposal. In addition, service providers with such an interest may be required to complete the EPPF's standard declaration of interest form.

8. Liability

8.1. The service provider shall use reasonable skills and care expected from an expert in its industry in the provision and delivery of the services and the deliverables in terms of the Agreement.

8.2. The service provider shall accept liability to pay compensation for damages and losses suffered by the Fund arising as a direct result of breach of contract, misconduct, dishonesty/fraud or negligence (including gross negligence) on its part or third parties acting on behalf of the service provider in respect of Services provided in connection with or arising out of the Agreement (or any variation or addition thereto).

9. General

9.1. Force Majeure

Neither of the parties to the Agreement will be liable to the other for any delay or failure to fulfil obligations caused by circumstances beyond its reasonable control.

9.2. Assignment

Neither of the parties to the Agreement may cede, assign, delegate, transfer, encumber, charge nor otherwise seek to deal in any of its rights or obligations under the Agreement without the prior written consent of the other party.

9.3. Notices

Notices must be served either personally, sent by prepaid registered post or faxed to the address of the other party given in the Agreement or to any other address as the parties may have notified during the period of the agreement. Any notice sent by registered post will be deemed to have been delivered 10 days after sending. Any notice sent by fax or served personally will be deemed to have been delivered on the first working day following its dispatch.

9.4. Amendment

Any amendment or consensual variation, cancellation or termination of the Agreement, or any of its terms, will not be effective unless agreed in writing and signed by both parties.

9.5. Survival

The confidentiality clause in the Agreement shall survive the termination or expiry of the agreement and shall continue to bind the parties to the agreement.

9.6. Electronic Communications

During the provision of the Services, the Fund may from time to time communicate electronically. However, as the service provider is aware, the electronic transmission of information cannot be guaranteed to be secure or error-free and such information could be intercepted, corrupted, lost, destroyed, arrive late or incomplete or otherwise be adversely affected or unsafe to use.

Accordingly, whilst the Fund carries out commercially reasonable procedures to check for the most known viruses and to check the integrity of data, it remains the service provider's responsibility to carry out a virus check on any documents before launching them, whether to be sent or to be received on disk or otherwise. Therefore and notwithstanding any collateral contract, warranty or representation, the Fund will have no liability to the service provider on any basis, whether in contract, delict (including negligence) or otherwise, in respect of any error or omission arising from or in connection with the electronic communication of information to or from the service provider and the service provider's reliance on such information and including (but not limited to) the acts or omissions of the relevant service providers.

If the communication relates to a matter of significance on which the service provider wishes to rely and is concerned about the possible effects of electronic transmission, the service provider should request a hard copy of such transmission from the Fund.

9.7. Validity of contract provisions

If any provision of the Agreement is held to be invalid, in whole or in part, such provision shall be deemed not to form part of the Agreement. In any event the enforceability of the remainder of the agreement will not be affected.

9.8. Conflict

In the event of any conflict between the Agreement and any other document that forms part of the Agreement, the Agreement shall prevail except where amended by specific reference to the relevant Clause of the Terms of Business. In the event and only to the extent of any conflict between the Agreement and any referenced or attached document other than the Terms of Business, the Agreement will take precedence.

9.9. Applicability

The Agreement shall apply to work undertaken in relation to the service provider, its holding company or any of its subsidiary, associated or related companies, agents or sub-contractors providing services in terms of the agreement.

10. Dispute Resolution and Governing Law

Should any dispute arise between the Fund and the service provider, both parties will attempt to resolve the dispute in good faith through senior-level negotiations. If the dispute is not resolved through negotiation or mediation within a reasonable time both parties agree that it shall be finally resolved in accordance with the rules of the Arbitration Foundation of South Africa by an arbitrator or arbitrators appointed by the Foundation and agreed upon by both parties. The arbitration clause does not prohibit a party from seeking relief in a dispute where urgency can be proved, and where, as a result, an application can be made for an urgent interdict, urgent declaratory order, or other urgent relief to any court of competent jurisdiction, on condition that such urgent relief is only of an interim nature pending the determination of the dispute by the arbitrator. The parties submit in this regard, to the non-exclusive jurisdiction of the Gauteng Local Division, Johannesburg.

The Terms of Business and the Agreement shall be subject to South African law.

11. Quotation/Proposal Conditions Validity of Quotations

Quotations must be valid for at least 90 days from the closing date of the tender. Include original valid tax clearance certificates, proof of registration of the business, audited annual financial statements and the latest B-BBEE certification.

12. Disqualifying Criteria

- Failure to submit before the specified date and time
- Failure to comply with paragraph 4.6.1 to 4.6.4 of the RFP.
- A minimum of five (5) years demonstrated experience of successful Integration layer platforms implementations.
- Failure to submit requested mandatory supporting documentation in 6.6.

- Acceptance of the RFP terms and conditions – contract terms and condition shall be discussed and negotiated with the successful Bidder.

13. VAT

VAT must be included in all prices and costs quoted, where applicable.

14. Closing Date for Proposal Submission

The closing date and time for submission of proposals at the delivery address indicated is **18 August 2026 at 16h00 pm**

The Fund reserves the right to withdraw, at any stage of this process, amend or cancel this RFP, reject or not accept any or all proposals, obtain any information from any lawful source regarding the past business history and practices of the respondent, and to take any such information into consideration in the evaluation process.

15. Acceptance

By signature of this document, the service provider agrees to be bound by the terms of business contained herein.

Signed in acceptance on behalf of ……………………………………………………being duly authorised thereto.

Signed at……………………………. on this……day of………………….2026

Name & Surname………………………………

Designation……………………………………..

Signature………………………………………

Annexure A – Mandatory Requirements Checklist

Please make use of the checklist to ensure that all mandatory requirements are met and to avoid being disqualified

No.	Document required or requirement(s)	Submitted? Yes/No
1.	Submitted as per the closing date and time	
2.	Compliance requirement - structure of the responses (4.6.1 to 4.6.4)	
3.	A minimum of five (5) years demonstrated experience of successful implementations of integration layer platforms and related infrastructure services and solutions	
4.	Acceptance of the RFP terms and conditions – contract terms and condition shall be discussed and negotiated with the successful Bidder.	
5.	A detailed statement of the company's B-BBEE credentials as required in the above, supported by a rating certificate from a SANAS accredited rating institution or a B-BBEE affidavit.	
6.	Recent Audited Financial Statement of the specific entity that will be submitting the proposal. Group or any other entity's Annual Financial Statements will not be accepted. Respondents who are not required by law to have audited financial statements must include a letter signed by an authorised official confirming that the respondent is not required by law to have audited financial statements and accordingly, is unable to provide the same.	
7.	Respondents must complete the EPPF POPIA Self Compliance Forms (EPPF Operator Privacy Due Diligence Form and Operator Privacy Compliance Self-Assessment Form)	
8.	Declaration (Formal letter) as per (6.1) under Further required submissions	

9.	A valid Tax Clearance Certificate and/or PIN indicating good standing with the South African Revenue Services (SARS);	
10.	Certified copies of CIPC company registration documentation. In the case of respondents who are not companies as envisaged in the Companies Act of 2008, equivalent founding documents must be submitted.	

Annexure B: EPPF POPIA Compliance Forms (Form 1 : EPPF Operator Privacy Due Diligence Form and Form 2 : Operator Privacy Compliance Self-Assessment Form)