
TERMS OF REFERENCE:

**THE APPOINTMENT OF A SUITABLE SERVICE PROVIDER FOR THE
PROVISION OF SHORT-TERM INSURANCE BROKERING AND CLAIMS
MANAGEMENT SERVICES FOR A PERIOD OF THREE (03) YEARS**

RFQ NUMBER: 1323

CLOSING DATE: 15 MAY 2026 @11H00

VALIDITY PERIOD: 60 DAYS

NB: On the last page of this document the bidder needs to declare and indicate that they have read and understood the document in full.

Proposals must be send to scm@companiestribunal.org.za

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1. INVITATION

The Companies Tribunal is inviting suitably qualified and experienced service providers for the provision of short-term insurance brokering and claims management services for a period of three (03) years.

2. BACKGROUND

The Companies Tribunal (the Tribunal) is an agency of the Department of Trade, Industry and Competition (the dtic). The Tribunal is established in terms of the Companies Act No 71 of 2008 (the Act) and its role is to adjudicate on applications and make orders in terms of the Act as well as resolve disputes through mediation, conciliation and arbitration.

3. SCOPE OF WORK

3.1 The successful bidder shall facilitate or provide insurance for all assets of the Companies Tribunal, including new assets. Ensure that all claims are attended to accordingly and that assets are correctly and comprehensively covered.

3.2 Ad-hoc adjustments and endorsements on sums insured and declaration to insurers/reinsurers.

3.3 Provide comprehensive insurance cover for losses which may be incurred due to:

- Property Theft and Vandalism
- Accidental Damages
- Damage by natural causes that may result in loss of assets
- Fire
- Public Liability
- Comprehensive Vehicle cover including roadside assistance
- All Business Risks
- Facilitate Claim Submission and Administration.
- Provide Other Administrative Services

NB: The above list serves as the guideline for requirements. Service providers must outline their service offering and claim processing procedures, turnaround time of finalizing claims as well as systems if available.

3.4 As an insurance broker advise the Tribunal on any other insurance relevant to the mandate of the organisation.

4. DELIVERABLES

- Insurance cover for the Tribunal's assets and business risk (professional indemnity)
- Handle claims on behalf of the Tribunal.

5. GENERAL REQUIREMENTS

- The bidders must submit a detailed company profile, detailing the history and years of relevant experience.

- CVs of the personnel responsible for handling the Tribunal project.
- Provide a detailed methodology demonstrating the ability to perform scope of work and deliverables as detailed in section three (3) and four (4).
- Provide contactable reference letters from clients where similar services have been rendered

6. EVALUATION PROCESS

The Tribunal will evaluate all proposals in terms of the Preferential Procurement Policy Framework Act. No. 5 of 2000 (PPPFA). A three (3) phase evaluation criteria will be considered in evaluating the bid as follows:

a. Phase 1: Pre-Qualification Criteria (Mandatory requirements)

This stage checks and validates the bidder's compliance with legal requirements to conduct business with the government of South Africa.

All proposals duly lodged will be examined to determine compliance with bidding requirements and conditions (completion and attachment of compulsory documents). NB: No points will be allocated to this stage; however, bidders that do not comply with the Mandatory requirements below will be disqualified and will not advance to the next stage of evaluation.

Pre-Qualification Requirements		Check list √ Tick each box
SBD 1:	Completed, attached and signed	
SBD 3.1:	Completed, attached	
SBD 4:	Completed, attached and signed	
SBD 6.1:	Completed, attached and signed	
Terms of Reference document: Completed, attached and signed		
General Conditions of Contract: Initialled and attached		
Proof of registration on Central Supplier Database (managed by National Treasury) a report not older than a month of the date of submission must be submitted		
Proof of registration with Financial Sector Conduct Authority (FSCA)		

Note: All SBD forms must be submitted (signed) noting where it is not applicable. If any specific SBD form is not submitted, documentary proof clearly stating the reasons must be attached.

Failure to adhere to the above conditions will invalidate the proposal.

Bidders must also supply the following documents (where applicable).

Other Requirements	Check list √ Tick each box
Valid B-BBEE Certificate or (attach certified copy) or Sworn Affidavit	
Company Registration documents	

b. Phase 2: Functional/Technical Evaluation

Only bidders that have met the pre-qualification criteria will be evaluated for functional evaluation. In this phase the evaluation will be based on the bidder's responses in respect of the bid proposal. Prospective bidders who score a minimum of 65 points or more will be considered for the next phase 3 (Pricing and Specific Goals).

All proposals will be evaluated for functionality as follows:

Technical (Functionality) proposal	Weight	Score	Total
1 Company experience: The company profile must clearly indicate the number of years in business providing short-term insurance brokerage and claims management services <ul style="list-style-type: none"> • No information provided = 0 points • 0 - 5 years = 10 points • More than 5 years – 10 years = 15 points • More than 10 years – 15 years = 20 points • More than 15 years = 25 points 	25		
2 Project Personnel Project team CV's with years of experience and relevant qualifications: <ul style="list-style-type: none"> • No information provided = 0 points • 1 - 5 years' experience + relevant qualification = 10 points • 6 - 10 years' experience + relevant qualification = 20 points • 11+ years' experience + relevant qualification = 30 points 	30		
3 Methodology/Approach: Demonstrate the ability to perform scope of work and deliverables as detailed in section three (3) and four (4) and the turnaround times for claims	25		
4 Reference Letters: Provide contactable reference letters where a similar service was provided. <ul style="list-style-type: none"> • No reference letters = 0 points • 1-3 reference letters = 5 points • 4-6 reference letters = 10 points • 7-9 reference letters = 15 points • More than 9 reference letters = 20 points 	20		
Total technical points	100		
Minimum threshold for technical (functionality)	65		

Score	Description
1	Does not meet requirements, or no information supplied.
2	Meet some of the requirements
3	Almost meet all requirements
4	Fully meet all requirements
5	Exceeds all requirements

c. Phase 3: Price and Specific Goals

- All quotations up to the rand value of R 50 000 000.00 including all applicable taxes will be evaluated on the 80/20 principle as prescribed by the Preferential Procurement Policy Framework Act 5 of 2000 and its Regulations.
- **NB** - Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids to substantiate their specific goal as stated below. However, Bidders who do not submit B-BBEE Status Level Verification Certificates do not qualify for specific goals points, but they will not be disqualified from the bidding process.
- The lowest acceptable price will score 80 points, the 20 specific goals points will be allocated as follows:

SPECIFIC GOAL	TOTAL POINTS
Percentage (%) Black Ownership	Points (10)
91-100	10
81-90	9
71-80	8
61-70	7
51-60	6
41-50	5
31-40	4
21-30	3
11-20	2
1-10	1
0	0
Percentage (%) Ownership By Women	Points (4)
81-100	4
51-80	3
31-50	2
1-30	1
0	0

SPECIFIC GOAL	TOTAL POINTS
Percentage (%) Ownership By Youth	Points (4)
81-100	4
51-80	3
31-50	2
1-30	1
0	0
Percentage (%) Ownership By People living With Disability	Points (2)
51-100	2
1-50	1
0	0

7. VALIDITY OF PROPOSALS

- The Supplier is required to confirm that it will hold its proposal valid for **60 days** from the closing date of the submission of proposals.
- In exceptional circumstances, CT may solicit the bidder's consent to an extension of the period of the validity of the bid. The request and responses thereto shall be made in writing.

8. PROPOSAL SUBMISSION REQUIREMENTS

- All compulsory documents as stated under point 6 above.
- The bid proposal as per point 3 above
- In case of joint ventures, bidders must provide a clear agreement regarding joint venture/consortia.
- A trust, consortium or joint venture must submit a consolidated B-BBEE status level verification certificate.
- No late bids will be considered.
- It is the bidder's responsibility to ensure that the bid is sent to the correct physical address and that it is received by CT before the closing date and time in CT's dedicated

tender box or physical address. The office hours are 08h00 to 16h00 from Monday to Friday, except on public holidays.

Proposals must be emailed to scm@companiestribunal.org.za

9. PRICING

- Only a firm pricing schedule will be accepted for this tender (Completed form SBD 3.1)
- The quoted price should be in South African Currency and must include all taxes.
- The quoted price must be valid for a period of 60 days from the closing date of the bid.
- The Tribunal will not be liable for any cost incurred in the preparation of proposals.
- Payment will be made within 30 days after receipt of the valid original tax invoice.

10. DISCLAIMER

The Tribunal reserves the right to

- Award the contract or any part thereof to one or more service providers
- Reject all bids
- Decline to consider any bids that do not conform to any aspect of the bidding process
- Request further information from any service provider after the closing date, for clarification purpose
- The Tribunal reserves the right at any time to visit the premises of the bid proposer if deemed necessary to ensure security of the information.
- Any false declaration of information will result in the exclusion of the bid proposal from consideration.

11. NOTES TO BIDDERS

This section outlines basic requirements that must be met. Failure to meet these requirements or part thereof may result in your proposal being excluded from the evaluation process

- Proposal documents must be submitted to the Tribunal

- The Tribunal will not be liable for any cost incurred by the bidder in the preparation of proposals
- Evaluation of proposals will be carried out by the Tribunal. The Bid Evaluation Committee will, if necessary, contact bidders to seek clarification on any aspect of the proposals.
- Service providers must sign the register at the reception when the proposal is submitted

12. ENQUIRIES

Technical : Solly Mahlabane
 Telephone: (012) 394 5670
 Email: SMahlabane@companiestribunal.org.za

Supply Chain Management : Dikeledi Rathlogo
 Telephone: (012) 394 3680
 Email SCM@companiestribunal.org.za

13. APPROVAL

Approval			
	Name and Title	Signature	Date
Approved by:	MI MATHATHO (ACTING COO)		23/04/2026

14. DECLARATION BY THE BIDDER

I, (Full names)
 the undersigned certify that the information provided is true and correct, and understood
 the contents of the document in full.

SIGNATURE :

DATE: