



Corner Bonaero Drive and Cote D' Azur Avenue • Jewellery Manufacturing Precinct-  
 Building 4 • OR Tambo • SEZ Ortia SEZ Precinct 1 • Bonaero Park  
 P. O. Box 16001 • Doornfontein • 2028 • South Africa  
 +27 (0) 11 223 7000 • info@sadpmr.co.za • www.sadpmr.co.za  
 @sadpmr sadpmr sadpmr

## REQUEST FOR BID

**RFB NO: 01-2025**

**DESCRIPTION: APPOINTMENT OF AN INSURANCE BROKER TO PROVIDE SHORT-TERM INSURANCE SERVICES FOR THE ASSETS OF SADPMR FOR THE PERIOD OF 36 MONTHS.**

The Bid must be submitted on the letterhead of your business and submitted not later than:

Date: 23 June 2025

Time : 11:00 AM

Venue: Corner Bonaero Drive and Cote D Azur Avenue

Kempton Park 1622, South Africa Diamond, and Precious Metal Regulator

### The following conditions will apply:

- 1) Price (s) quoted must be valid for ninety days (90) from the closing date of the tender.
- 2) Price(s) quoted must be firm and inclusive of VAT.
- 3) A firm delivery period must be indicated.
- 4) These quotations will be evaluated in terms of Preferential Procurement Regulations, 2022:

### 80 points for price

#### 20 points for specific goals as follows:

- Enterprises owned by black women- 5 points
- Entities that are small, medium, and micro enterprises- 5 points
- Entities owned by black people- 5 points
- Enterprises owned by youth- 5 points
- **Only bidders registered on the central supplier database (CSD) and with a CSD number will be considered for this tender, as this is a requirement from the National Treasury.**

5) BBBEE certificate / BBBEE Sworn Affidavit

6) Copies of ID's & CIPC & Latest downloaded CSD full registration report.

7) Late responses will not be considered.

### ISSUED BY:

**THE CHIEF EXECUTIVE OFFICER  
SOUTH AFRICAN DIAMOND AND  
PRECIOUS METALS REGULATOR**

**P.O. BOX 16001  
DOORFONTEIN  
2028**

**Tel: (011) 223 7000**

**CONTACT  
(SPECIFICATION)  
Mr. M Makume**

**E-mail:  
mmoloki@sadpmr.co.za**

### PERSON

**CONTACT  
(ADMINISTRATION)  
Ms. S Mabunda**

**E-mail:  
shalatim@sadpmr.co.za**

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PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN DIAMOND AND PRECIOUS METALS REGULATOR					
BID NUMBER:		RFB 01-2025	CLOSING DATE & TIME: 23 June 2025 @11:00AM		
DESCRIPTION		APPOINTMENT OF AN INSURANCE BROKER TO PROVIDE SHORT-TERM INSURANCE SERVICES FOR THE ASSETS OF SADPMR FOR THE PERIOD OF 36 MONTHS			
BID RESPONSE DOCUMENTS <i>MUST BE SUBMITTED TO THE BELOW DETAILS.</i>					
The Bid must be submitted on the letterhead of your business and submitted not later than: Date: 23 June 2025 Time :11:00 AM Venue: Corner Bonaero Drive and Cote D Azur Avenue Kempton Park 1622, South Africa Diamond, and Precious Metal Regulator					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON		M Makume		CONTACT PEOPLE	S Mabunda
TELEPHONE NUMBER		(011 223 7000		TELEPHONE NUMBER	(011) 223 7000
FACSIMILE NUMBER				FACSIMILE NUMBER	
E-MAIL ADDRESS		<a href="mailto:mmolokim@sadpmr.co.za">mmolokim@sadpmr.co.za</a>		E-MAIL ADDRESS	<a href="mailto:shalatim@sadpmr.co.za">shalatim@sadpmr.co.za</a>
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER		CODE		NUMBER	
CELLPHONE NUMBER					
FACSIMILE NUMBER		CODE		NUMBER	
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					

SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE	
				No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX]		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX]	
	Yes <input type="checkbox"/> <input type="checkbox"/>			Yes <input type="checkbox"/> No <input type="checkbox"/>	
	No				

**[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]**

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes <input type="checkbox"/> No <input type="checkbox"/>  [IF YES ENCLOSE PROOF]	ARE YOU AFOREIGN BASEDSUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	Yes <input type="checkbox"/> No <input type="checkbox"/>  [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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**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 REVENUESERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

**PART B**

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
<b>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.</b>
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
<b>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
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:

.....

**PRICING SCHEDULE – FIRM PRICES  
(PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

Name of bidder.....	Bid number.....
Closing Time 11:00	Closing date.....

OFFER TO BE VALID FOR.....DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
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- Required by: .....
- At: .....
- Brand and model .....
- Country of origin .....
- Does the offer comply with the specification(s)? \*YES/NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....  
\*Delivery: Firm/not firm
- Delivery basis .....

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

\*\* "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

\*Delete if not applicable

**BIDDER'S DISCLOSURE****1. PURPOSE OF THE FORM**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. Inline 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.

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<sup>1</sup> 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

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<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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

2.2.1 If so, furnish particulars:

.....  
.....

**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:

.....  
.....

### **3 DECLARATION**

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> 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

\_\_\_\_\_

<sup>2</sup> 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.



submit or not to submit the bid, bidding with the intention not to win the bid and conditions of delivery particulars of the products or services to which this bid invitation relates.

- 3.4 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.
- 3.5 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.
- 3.6 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.

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.

.....	..... Signature
	Date
.....	.....
Position	Name of bidder

## 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**

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#### 7. GENERAL CONDITIONS

- The following preference point systems are applicable to invitations to tender:
  - the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
  - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

- To be completed by the organ of state**

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

- Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
  - (a) Price; and
  - (b) Specific Goals.

- To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 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.

- 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.

## 8. DEFINITIONS

- (a) **"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;
- (b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **"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
- (e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 9. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 7.1 POINTS AWARDED FOR PRICE

#### 7.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

### 7.2 FORMULAE FOR GOOD AND SERVICES

#### 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**

$$P_{max} \quad P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where  $P_s$  = Points scored for price of tender under consideration  
 $P_t$  = Price of tender under consideration  
 $P_{max}$  = Price of highest acceptable tender

## **10. POINTS AWARDED FOR SPECIFIC GOALS**

8.1. 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:

8.2 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—

(a) 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

(b) 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.

**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 (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprises owned by black people.		5		
Entities owned by black women.		5		
Enterprises owned by youth.		5		
Entities that are small, medium, and micro enterprises.		5		

**NB: Please submit all supporting documents to substantiate the above, failure to submit will result in non-allocation of points.**

### 8.3 DECLARATION WITH REGARD TO COMPANY/FIRM

8.3.1 . Name of company/firm.....

8.3.2 Company registration number: .....

8.3.3. TYPE OF COMPANY/ FIRM

- a) Partnership/Joint Venture / Consortium
  - b) One-person business/sole propriety
  - c) Close corporation
  - d) Public Company
  - e) Personal Liability Company
  - f) (Pty) Limited
  - g) Non-Profit Company
  - h) State Owned Company
- [TICK APPLICABLE BOX]

8.4 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:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) 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 –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) 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;
  - (d) 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
  - (e) forward the matter for criminal prosecution, if deemed necessary.

.....

**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....  
.....  
.....

## **TERMS OF REFERENCE FOR AN ADVERTISEMENT OF A BID FOR AN INSURANCE BROKER TO PROVIDE A SHORT-TERM INSURANCE SERVICES FOR THE ASSETS OF SADPMR FOR THE PERIOD OF 36 MONTHS**

### **1. PURPOSE**

- 1.1. The purpose of this bidding document is to invite potential experienced service providers that can provide appropriate and value-adding brokering services for short-term insurance cover to SADPMR physical assets.
- 1.2. This bidding document intends to provide prospective Service Providers with adequate information to understand and respond to SADPMR's requirements for the provision of short-term insurance services. It serves to ensure uniformity in responses and to provide a structured framework for the evaluation of proposals.
- 1.3. The contract will be for three (3) years commencing on the date as prescribed in the Letter of Award and signed Service Level Agreement.

### **2. BACKGROUND**

- 2.1. SADPMR is a public entity listed in Schedule 3A of the Public Finance Management Act, Act 1 of 1999, and must meet the requirements of that Act.
- 2.2. Section 51 of the PFMA requires an accounting authority for a public entity to ensure that a public entity has and maintains effective, efficient, and transparent systems of financial and risk management and internal control. SADPMR manages losses risks by insuring its assets against any loss, damage, or any other risk.
- 2.3. SADPMR must minimize its risks by ensuring that the risks are allocated to the service provider that is best suited to manage risks and ensure that all its assets are insured.
- 2.4. This bid document is intended to provide a scope of work and deliverables, from which a service provider would be appointed to provide short-term insurance services.

### **3. SCOPE OF SERVICES REQUIRED**

The successful bidder is required to:

- 3.1 Provide SADPMR with comprehensive insurance cover with legitimate and experienced underwriters for losses and damages on assets as listed in **annexure A**.



- 3.2. Provide a clear and user-friendly claim procedure, with a turnaround time of not more than seven (7) business days once the claim is submitted for loss/damages.
- 3.3. Facilitate insurance for SADPMR for all assets categories/portfolios, including additional assets that will be acquired during the period of the contract.
- 3.4. Facilitate ad hoc adjustments and endorsements on sums insured and declaration to insurers/re-insurers.
- 3.5. Remove assets(s) from insured list which SADPMR would have identified as a result of disposal, or any other reason SADPMR may deem appropriate.
- 3.6. Report regularly on the progress on all claims, risk control issues and other general matters raised.
- 3.7. Ensure a quick turnaround of documentation and interpret the insurance fine prints for SADPMR.
- 3.8. The bidder must disclose the insurer or consortium of insurers on each portfolio of insured assets.

#### **4. EVALUATION CRITERIA**

The bid will be evaluated on the following three (3) stages:

##### **4.1 STAGE 1: MANDATORY REQUIREMENTS**

- 4.1.1 Bidders must submit the following documents to advance to the Functionality Evaluation:
  - a. Attach valid proof of registration as a Financial Services Provider (FSP)
  - b. Attach valid proof of Professional Indemnity cover.

##### **4.2 STAGE 2: FUNCTIONALITY EVALUATION**

The functionality will be scored against the following criteria. Please note that where a "Minimum Rating to Qualify" for a criterion has been indicated, a bidder will be





disqualified if not achieved.

FUNCTIONALITY: PHASE 1		
Criteria	Sub - criteria	Points
<b>Bidder's relevant experience.</b>	<p>Company experience (Minimum 3 years' experience in rendering or administering short-term insurance). The bidders must include company profile.</p> <p><b>Scoring criteria:</b></p> <ol style="list-style-type: none"> <li>1. 3 years = 5 points.</li> <li>2. 4-5 years = 10 points.</li> <li>3. 6 years and above = 15 points.</li> </ol> <p>The service provider must submit reference or award letter(s) from previous clients organisation(s) where short-term insurance services were provided.</p> <p>The reference letters must be on the company's official letterhead and duly signed by an authorized representative.</p> <p>SADPMR reserves the right to contact the organisation(s) in the reference or award letter(s) without prior notice to the bidder.</p> <p><b>Scoring criteria:</b></p> <ol style="list-style-type: none"> <li>1. A bidder with no reference or award letter = 0 points.</li> <li>2. A bidder with one to two reference(s) or award letters = 5 points.</li> <li>3. A bidder with three to four reference or award letters = 10 points.</li> </ol>	<b>40</b>



## FUNCTIONALITY: PHASE 1

Criteria	Sub - criteria	Points
	<p>4. A bidder with five to six reference or award letters = 15 points.</p> <p>5. A bidder with seven or more reference or award letters = 25 points.</p> <p><b>NB:</b></p> <ul style="list-style-type: none"> <li>Reference letter(s) may not be replaced by letters of agreement, contracts or purchase orders.</li> </ul>	
<p><b>Qualifications and experience of bidder's Lead Broker/Consultant who will be assigned to the contract.</b></p>	<p>The bidder must attach Curriculum Vitae (CV), finance or any insurance related qualifications of the Lead Broker/Consultant as these will be used in the scoring/allocation of points.</p> <p><b>Scoring criteria:</b></p> <ol style="list-style-type: none"> <li>Lead Broker/Consultant with qualification(s) but less than three years working experience = 0 points.</li> <li>Lead Broker/Consultant with zero qualification(s) but more than three years working experience = 0 points.</li> <li>Lead Broker/Consultant with qualifications and three years working experience = 5 points.</li> <li>Lead Broker/Consultant with qualifications and four to five years working experience = 10 points.</li> <li>Lead Broker/Consultant with qualifications and six or more years working experience = 20 points.</li> </ol> <p><b>NB:</b> The bidder is required to submit a list of all team members' credentials who will be involved in the project,</p>	<p><b>20</b></p>



<b>FUNCTIONALITY: PHASE 1</b>		
<b>Criteria</b>	<b>Sub - criteria</b>	<b>Points</b>
	specifying the Lead Broker/Consultant.	
<b>Proof of valid Accredited Professional Insurance Association or affiliation of the lead broker/consultant.</b>	<p>The bidder must attach a valid certificate of membership or affiliation of the Lead Broker/Consultant as a Financial Service Provider (FSP) to obtain points.</p> <p><b>Scoring criteria:</b></p> <ol style="list-style-type: none"> <li>1. Lead Broker/Consultant with no valid membership certificate or affiliation (FSP) = 0 points.</li> <li>2. The Lead Broker/Consultant with a valid membership certificate or affiliation (FSP) = 25 points.</li> </ol> <p><b>NB:</b> The above will be supported by live verification of the validity of FSP during evaluation.</p>	<b>25</b>
<b>Proof of address</b>	<p><b>Scoring criteria:</b></p> <ol style="list-style-type: none"> <li>1. Non-submission = 0 points.</li> <li>2. Proof of address (Municipality bill not less than 3 months or existing lease agreement or similar proof with contacts and address) = 5 points.</li> </ol>	<b>5</b>
<b>Financial capabilities</b>	<p><b>Scoring criteria:</b></p> <ol style="list-style-type: none"> <li>1. Proof of funds or 3 months bank statements = 5 points.</li> <li>2. Proof of funds or 3 months' bank statements</li> </ol>	<b>10</b>



FUNCTIONALITY: PHASE 1		
Criteria	Sub - criteria	Points
	and financial statements = 10 points	
<b>Total Points</b>	<b>100 Points</b>	

**NB: BIDDERS OBTAINING 70 POINTS OR MORE SHALL PROCEED TO PHASE TWO OF EVALUATION WHICH IS PRICE AND PREFERENCE POINTS.**

#### 4.3 STAGE 3: PRICE AND PREFERENCE POINTS.

The 80/20 Principle is based on Price and special goals for SADPMR.

The following formula is to be used to calculate the points out of 80 for price inclusive of all applicable taxes.

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

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

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of highest acceptable bid

4.3.2 A maximum of 20 points to be awarded to a bidder for the specific goals listed on the SADPMR preferential procurement policy as follows:

Special Goals	80/20 Points System	Relevant Evidence
Enterprises owned by black women.	5	BBEE certificate / Sworn Affidavit



Special Goals	80/20 Points System	Relevant Evidence
Entities that are small, medium, and micro enterprises.	5	BBBEE certificate / Sworn Affidavit
Entities owned by black people.	5	BBEE certificate / Sworn Affidavit
Enterprises owned by youth.	5	BBEE certificate / Sworn Affidavit

## 5 OTHER CONDITIONS

- 5.1 Bidders must submit an original bid and one (1) copy of the technical proposal plus an electronic copy on a USB.
- 5.2 Bidders are further requested to separate financial proposals from technical proposal/two envelopes system.
- 5.3 SADPMR reserves the right to end the contract at any stage in accordance with the General Conditions of Contract.
- 5.4 SADPMR reserves the right not to appoint any bidder.
- 5.5 SADPMR reserves the right to award the contract to a Bidder whose bid was not the lowest in price.
- 5.6 ADPMR reserves the right to award the bid to a Bidder who is not the highest scoring Bidder.
- 5.7 Any enquiries must be referred, in writing, to the specified person.
- 5.8 A bidder with a valid proof of SASRIA indemnity cover will have an added advantage.