REQUEST FOR QUOTATION

You are hereby invited to submit proposal to the South African Post Office Limited for Risk Financing Advisory and Short-term Insurance Brokerage Services for South African Post Office [SAPO for 3 year Term]

SECTION 1 **Section to be completed by bidder**

MAAA NUMBER:		
BIDDER COMPANY NAME		
BIDDER CONTACT PERSON		
BIDDER CONTACT DETAILS	**EMAIL:**	
	TEL :	

SECTION 2 **Section to be completed by SCM**

RFQ NUMBER:	**RFQ/26/27/64**		
ISSUE DATE:	2026/08/14		
CLARIFICATION QUESTIONS: CLOSING DATE AND TIME	2026/08/17	at	12:00
RFQ CLOSING DATE AND TIME	**2026/08/19**	at	11:00
PROPOSAL TO BE EMAIL TO	**SAPORFQ@POSTOFFICE.CO.ZA**		
RFQ VALIDITY PERIOD:	120 DAYS (from closing date of this RFQ)		
OBJECTIVE OF BID:	To appoint a suitably qualified service provider to act as SAPO's Insurance Broker for a period of three (3) years, with the option to renew annually. The award of this tender for a period of 36 months (3 years) is subject to conditions stipulate on the specification.		
Procurement Specialist	Bernadette van Zyl Bernadette.vanzyl@postoffice.co.za		

SCHEDULE OF DOCUMENTS

SBD1 - INVITATION TO BID

<table>
<tr><td colspan="6">YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN POST OFFICE LIMITED</td></tr>
<tr><td>Bid No:</td><td>RFQ/26/27/64</td><td>Closing Date</td><td>2026/08/19</td><td>Closing Time:</td><td>11h00</td></tr>
<tr><td>Description:</td><td colspan="5">Risk Financing Advisory and Short-term Insurance Brokerage Services for South African Post Office [SAPO for 3 year Term]</td></tr>
<tr><td colspan="6">BID RESPONSE DOCUMENTS MUST BE FORWARD TO:</td></tr>
<tr><td colspan="6">SAPORFQ@POSTOFFICE.CO.ZA</td></tr>
<tr><td colspan="6">BIDDING PROCEDURE AND TECHNICAL ENQUIRIES MAY BE DIRETED TO</td></tr>
<tr><td>Contact Person:</td><td colspan="5">BERNADETTE VAN ZYL</td></tr>
<tr><td>Telephone No:</td><td colspan="5">012-845-2452</td></tr>
<tr><td>Email Address:</td><td colspan="5">Bernadette.vanzyl@postoffice.co.za</td></tr>
<tr><td colspan="6">SUPPLIER INFORMATION</td></tr>
<tr><td>Name Of Bidder:</td><td colspan="5"></td></tr>
<tr><td>Postal Address:</td><td colspan="5"></td></tr>
<tr><td>Street Address:</td><td colspan="5"></td></tr>
<tr><td>Telephone No:</td><td>Code:</td><td></td><td>Number:</td><td colspan="2"></td></tr>
<tr><td>Cell-phone No:</td><td colspan="5"></td></tr>
<tr><td>Facsimile No:</td><td>Code:</td><td></td><td>Number:</td><td colspan="2"></td></tr>
<tr><td>Email Address</td><td colspan="5"></td></tr>
<tr><td>Vat Registration No:</td><td colspan="5"></td></tr>
<tr><td>Supplier Compliance Status:</td><td>Tax Compliance System Pin: [attached certificate]</td><td></td><td>Or</td><td>Central Supplier Database No:</td><td>MAAA</td></tr>
<tr><td>Are You The Accredited Representative In South Africa For The Goods /Services Offered?</td><td colspan="2">☐Yes ☐No
[IF YES ENCLOSE PROOF]</td><td colspan="2">Are You A Foreign Based Supplier For The Goods /Services Offered?</td><td>☐Yes ☐No
[IF YES, ANSWER THE QUESTIONNAIRE BELOW]</td></tr>
<tr><td colspan="6">QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</td></tr>
<tr><td colspan="5">IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA [RSA]?</td><td>☐ YES ☐ NO</td></tr>
<tr><td colspan="5">DOES THE ENTITY HAVE A BRANCH IN THE RSA?</td><td>☐ YES ☐ NO</td></tr>
<tr><td colspan="5">DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?</td><td>☐ YES ☐ NO</td></tr>
<tr><td colspan="5">DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?</td><td>☐ YES ☐ NO</td></tr>
<tr><td colspan="5">IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?</td><td>☐ YES ☐ NO</td></tr>
<tr><td colspan="6">IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</td></tr>
</table>

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**
2. TAX COMPLIANCE REQUIREMENTS
• BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
• <u>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.</u>
• APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
• BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
• <u>IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</u>
• WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
• 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 WHCH THIS BID IS SIGNED ……………………………………………
[Proof of authority must be submitted e.g. company resolution

DATE: ……………………………………………

SBD4 - BID 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. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

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 IN RESPECT OF EMPLOYEES OF THE STATE

2.1 Is the bidder, or any of the Directors / Trustees / Shareholders / Members / Partners of the Bidder employed by the State"? ☐ YES ☐ NO

If so, furnish particulars of the names, individual identity numbers, in table below.

Full Names	Identity Number	Name of State Institution

3. BIDDERS' DISCLOSURE IN RESPECT OF INDEPENDENT BIDDING

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

3.1 I have read and 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.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of 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 state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

4. DIRECTORS

Bidders to submit the list of Directors on the company letterhead as follows:

First Name	Middle Name (where applicable)	Surname	Gender	Race

5. SHAREHOLDERS

Bidders to submit the list of Shareholders on the company letterhead as follows:

First Name	Middle Name (where applicable)	Surname	Gender	Race

<u>Share certificates must be submitted</u>

I CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT AND ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS INFORMATION PROVE TO BE FALSE.

______________________________	______________________________
Signature	Date
______________________________	______________________________
Position/Designation	Name of Bidder

A.SCOPE OF SUPPLY AND SPECIFIC INSTRUCTIONS

1. DESCRIPTION OF SERVICE

SA Post Office require the service of a qualified bidder to do Risk Financing Advisory and Short-term Insurance Brokerage Services for South African Post Office [SAPO for 3 year Term]

2. POINT OF DELIVERY OF SERVICES

Risk department, Head Office NPC, Cnr Jeff Masemola and Sophie de Bruyn streets, Pretoria

3. PRICE BASIS

- Bidders shall take into account that the Post Office's total requirements may not be allocated to only one bidder.
- Where figures are referred to in numerals and in words and there is a conflict between the two, the words will prevail.
- The successful bidder shall commit to the programme of continuous improvement, which will result in cost-efficiencies during the currency of the relationship.

4. PAYMENT

- The Contract Price is the amount, agreed to by both parties during contract negotiation process, which the Post Office shall pay to the Service Provider for the Services rendered in terms of the Agreement. The Contract Price for the Services provided by the Service Provider to the Post Office shall be inclusive of VAT and payable 30 days upon statement date.

5. PROPOSAL DOCUMENTS

- Bidders responding to this RFQ are deemed to do so, on the basis that they acknowledge and accept all the Terms and Conditions of this RFQ.
- Proposals must be submitted through email address SAPORFQ@POSTOFFICE.CO.ZA. It is the bidder's sole responsibility to ensure that the bid has been received by the **2026/08/19 at 11:00**. **Late submissions will not be accepted.**
- All documents and correspondence must be in English, failure to comply, the bid proposal will not be evaluated.
- Pricing schedule must be completed in South African Rand (ZAR). Failure to provide the bid in South African Rand will result in the bid being non-responsive.
- If the proposal is submitted by a Consortium / JV / Partnership, each company forming part of the Consortium / JV / Partnership must submit consolidated BBBEE Certificate for scoring point and proof of Consortium / JV / Partnership.. If a consolidated BBBEE Certificate is not submitted together with the proposal at closing date of the bid, the bidder will not be disqualified but receive zero (0) points for Specific Goals/Preference points. Bidder must submit a valid BBBEE Certificate, an expired BBBEE Certificate will not be accepted. And must be valid at the bid closing date.

6. CONSULTATION PRIOR TO SUBMISSION OF A PROPOSAL

- Bidders shall consult, **in writing**, with the undernoted Post Office officials should there appear to be any discrepancy, ambiguity or uncertainty pertaining to the meaning or effect of any description, dimension, quality, quantity or any other information contained in this bid. The Post Office undertakes to provide clarification in writing to all Bidders, provided that the request is received prior to the closing date and time for clarifications.

Official	Location	Contact Details
Bernadette van Zyl [Procurement Officer]	South African Post Office Limited Supply Chain Management Cnr. James Dr & Moreleta St, Silverton, Pretoria.	012-845-2452 Bernadette.vanzyl@postoffice.co.za

7. CLARIFICATIONS

- Bidders are encouraged to submit clarification questions in writing to South African Post Office Officials mentioned above not later than end of day, **2026/08/17 at 09:00.** No further questions will be entertained after this period.
- The SAPO will respond in writing to queries and distribute to all bidders who attended the briefing session after receipt of questions.
- Oral communication or instruction by SAPO or its representative shall have no standing in this RFQ unless and until they have been confirmed in writing.
- SAPO accepts no responsibility for the failure of any bidder not receiving notifications or correspondence relating to this RFQ.

8. VALIDITY PERIOD OF PROPOSAL

- The period during which the Post Office shall have the right to accept a proposal without any right of withdrawal on the part of the bidder shall be **Hundred and Twenty [120] days** from the date on which proposals are due. After such period a bidder may withdraw his proposal if he has not been notified of its acceptance.
- Bidders are to note that they may be requested to extend the validity period of their bid, at the same terms and conditions, if the internal evaluation process has not been finalised within the validity period. However, once the adjudication body has approved the process and award of the business to the successful bidder(s), the validity of the successful bidder(s)' bid will be deemed to remain valid until a final contract has Should a bidder fail to respond to a request for extension of the validity period before it expires, that bidder will be excluded from the tender process? With regard to the validity period of next highest ranked bidders, refer to clause **10**

9. COST OF THE BID

- Each Bidder shall bear all of its costs (of whatsoever nature) associated with the preparation or submission of its bid and of negotiating with the SAPO regarding a possible contract agreement and any other costs and expenses incurred by the Bidders in connection with or arising out of the competitive procurement process.

10. BIDDING CONDITIONS

- The South African Post Office reserves the right to reject and/or disqualify any proposal:
  - Received without the data and information requested.
  - Submitted after the stated submission deadline [closing date]
  - Which does not conform to instructions and specifications detailed herein
- That fails to comply with specification.
  - That contains any information that is found to be incorrect or misleading in anyway.
  - Such non-compliant bids shall be rejected without further evaluation, provided that SAPO believes, in its own discretion, that the non-compliance is minor then SAPO may continue with the evaluation, or seek clarification thereon or reject the Bid.
- The South African Post Office reserves the right:
  - Not to award or cancel this RFQ at any time and shall not be bound to accept the highest scoring or any bid.
  - To negotiate with one or more Preferred or Reserved Bidders identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other Bidder who has not been awarded the status of the Preferred or Reserved Bidder.
  - To accept part of a bid rather than the whole bid.
  - To split the award of the bid between two or more Bidders.
  - To cancel and/or terminate the bid process at any stage, including after the Closing Date and/or after presentations have been made, and/or after bids have been notified of their status.
  - To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the Services bidded for, whether before or after adjudication of the bid.
  - Request audited financial statements or other documentation for the purposes of a due diligence exercise; to cancel the contract and/request that National Treasury place the Respondent on its Database of Restricted Suppliers for a period not exceeding 10 years, on the basis that a contract was awarded on the strength of incorrect information furnished by the Respondent or on any other basis recognised in law;
  - To award the bid to a Bidder who is not the highest scoring Bidder, provided that an objective criteria was indicated in the evaluation criteria.

- To correct any mistakes at any stage of the bid that may have been in the bid documents or occurred at any stage of the bid process.
- To award the business to the next ranked bidder, provided that he/she is still prepared to provide the required Goods/Services at the quoted price, should the preferred bidder fail to sign or commence with the contract within a reasonable period after being requested to do so. Under such circumstances, the validity of the bids of the next ranked bidder(s) will be deemed to remain valid, irrespective of whether the next ranked bidder(s) were issued with a Letter of Regret. Bidders may therefore be requested to advise whether they would still be prepared to provide the required Goods/Services at their quoted price, even after they have been issued with a Letter of Regret.
- No attempts may be made, whether directly or indirectly, to canvass any member of SAPO staff before the award of the contract. Any enquiries must be referred, in writing, to the specified person(s).

10 JOINT VENTURES, CONSORTIUMS, PARTNERSHIPS AND TRUSTS

- A trust, consortium or joint venture, will qualify for points for their specific goal as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- A trust, consortium or joint venture will qualify for points for their specific goal as an unincorporated or incorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. SAPO will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.
- The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, with the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

11 SAMPLES (If applicable)

SAPO shall not pay for samples provided and damaged / destroyed samples as a result of destruction testing.

12 CONDITIONS OF PURCHASE

The terms and conditions applicable to any order / contract that may result from this bid will be stated in the main contract between SAPO and appointed service provider.

B.CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

1 DEFINITION

Unless otherwise expressly stated, or the context otherwise requires, the words and expressions listed below shall, when used in this Confidentiality Agreement, bear the meanings ascribed to them:

1.1 "**Bidder**" shall mean any person who attends the briefing session and/or any entity which is represented at the briefing session whose details and signature are set out in the attendance register;

1.2 "**Confidentiality Agreement**" shall mean this confidentiality Agreement; and

1.3 "**Post Office**" shall mean the South African Post Office, a public company with limited liability duly incorporated in accordance with company laws of the Republic of South Africa with registration number 1991/005477/06.

2 INTRODUCTION

2.1 The Bidder has attended a briefing session which is hosted by the Post Office, at which the Post Office shall provide information to Bidders who wish to enter into discussions with the Post Office concerning a number of issues pertaining to the possible provision of services by the Bidder to the Post Office, which discussions may or may not result in the Post Office and the Bidder entering into an agreement, arrangements, discussions or alliances.

2.2 During the briefing session and in negotiating the business relations, the Post Office shall disclose confidential information relating to its business to the Bidder.

2.3 The Bidder agrees to be bound by the terms and to be subject to the conditions of this Confidentiality Agreement.

3 CONFIDENTIAL INFORMATION

Confidential Information in respect of this Confidentiality Agreement shall include, but not be limited to, all oral, written, printed, photographic and recorded information of all types that is:

3.1 Confidential or secret information relating to the commercial and financial activities of the Post Office, which would include legal, financial, contractual or commercial arrangements between the Post Office group of companies, customers and/or third parties;

3.2 Confidential information and details concerning current or prospective customers, suppliers, commercial associates and other parties with whom the Post Office enjoys a commercial relationship;

3.3 Proposed, impending or actual commercial transactions, arrangements, ventures, agreements or opportunities which are of a confidential or secret nature;

3.4 Trade secrets, operating procedures, quality control procedures, approximate operation personnel requirements, descriptions, trade names, trademarks, know how, techniques, technology, copyright, and all goodwill relating to the business and any other existing intellectual property rights or any intellectual property created as a result of the provision of services;

3.5 confidential or privileged information concerning disputes, claims, litigation or similar actions in which any party is or may become involved; and

3.6 Any other information surrounding the nature of the discussions giving rise to this Confidentiality Agreement.

4. EXCLUDED INFORMATION

There will be no obligation of confidentiality or restriction on the use of information where:

4.1 The information is publicly available, or becomes publicly available otherwise than by action of the Bidder; or

4.2 The information was already known to the Bidder (as evidenced by its written records) prior to its receipt under this or any previous confidentiality agreement between the parties or their affiliates; or

4.3 The information was received from another party not in breach of an obligation of confidentiality.

5. NON-DISCLOSURE

5.1 The Bidder acknowledges that the Confidential Information is a valuable and unique asset proprietary to the Post Office.

5.2 The Bidder agrees that it shall not disclose the Confidential Information to any third party for any reason or purpose whatsoever without the prior written consent of the Post Office.

5.3 The Bidder may disclose the Confidential Information only to its directors and other officers, employees and professional advisors agents and consultants only on a strictly need-to-know basis and on the terms and conditions provided for in this Confidentiality Agreement.

5.4 The Bidder undertakes not to use the Confidential Information for any purpose other than:

5.4.1 That for which it is disclosed; and

5.4.2 In accordance with the provisions of this Confidentiality Agreement.

5.5 The Bidder undertakes to ensure that their employees will observe and comply with their obligations in respect thereof, whether or not they remain employees of the Bidder.

5.6 The Bidder agrees that it shall only, where necessary, disclose the Confidential Information to its professional advisers, agents and consultants, provided that such professional advisers, agents and consultants sign a similar undertaking and that they are aware of the confidential nature of the information being made available to them.

5.7 The Bidder shall takes all steps necessary to procure that such professional advisers, agents and consultants agree to abide by the terms of this Confidentiality Agreement to prevent the unauthorized disclosure of the Confidential Information to third parties.

6. OWNERSHIP

6.1 All Confidential Information disclosed by the Post Office to the Bidder is acknowledged by the Bidder to be proprietary to the Post Office who shall retain all right, title and interest in and to that information.

6.2 The possession of the Confidential Information by the Bidder does not to confer any rights of whatever nature in such Confidential Information to the Bidder.

6.3 No provision in this Confidentiality Agreement shall be interpreted to confer any right of license under any trademark, patent or copyright, or any applications for such a trademark, patent or copyright which may be pending now or in the future to the Bidder.

7. STANDARD OF CARE

The Bidder agrees that it shall protect the Confidential Information disclosed pursuant to the provisions of this Confidentiality Agreement using the same standard of care that it applies to its own proprietary, secret or confidential information, but in any event not less than a reasonable standard of care, and that the Confidential Information shall be stored and handled in such a way as to prevent any unauthorized disclosure thereof.

8. RETURN OF CONFIDENTIAL INFORMATION

8.1 The Post Office may at any time request the return of the Confidential Information disclosed to the Bidder. Upon the return of the Confidential Information, the Bidder shall submit a written statement to the Post Office confirming that the Bidder has not retained in its possession or under its control, either directly or indirectly, any Confidential Information.

8.2 Alternatively to the return of the material contemplated in clause 0 above, the Bidder shall, at the request of the Post Office, destroy the Confidential Information and furnish the Post Office with a written statement to the effect that all Confidential Information in the possession or under the control of the Bidder has been destroyed.

8.3 The Bidder shall comply with the request in terms of this clause 8 within forty-eight hours of receipt of such a request.

9. BREACH

9.1 Any breach of any obligation or undertaking by the Bidder will constitute a material breach of this Confidentiality Agreement.

9.2 The Bidder shall be liable to pay the Post Office all costs incurred in the protection of its interests in terms of this Confidentiality Agreement on an attorney and own client scale.

9.3 The Bidder acknowledges that the Post Office shall be entitled to apply to court for an interdict or other appropriate relief against the Bidder, should the Post Office have any reasonable basis to believe that the Bidder is or may be in breach of this Confidentiality Agreement and thus endangering the proprietary interests of the Post Office.

10. DURATION

The obligations undertaken by the Bidder in terms of this Confidentiality Agreement shall endure notwithstanding the termination of this Confidentiality Agreement or notwithstanding that either party decides at any time, whether before or after the commencement of this Confidentiality Agreement, not to pursue the discussions to enter into a business relationship or that the relationship between the parties pursuant to those discussions is terminated for any reason whatsoever

11. GENERAL

11.1 This Confidentiality Agreement constitutes the sole record of the agreement between the parties with regard to the subject matter hereof. No party shall be bound by any express or implied term, representation, warranty, promise or the like not recorded herein.

11.2 No addition to, variation of, or agreed cancellation of this Confidentiality Agreement shall be of any force or effect unless in writing and signed by or on behalf of the parties.

11.3 No relaxation or indulgence which the Post Office may grant to the Bidder shall constitute a waiver of the rights of the Post Office and shall not preclude the Post Office from exercising any rights which may have arisen in the past or which might arise in future.

11.4 The Bidder agrees and confirm by their signature to the RFQ Documents that any present and/or previous discussions or correspondence shall, for purposes of this Confidentiality Agreement, be considered to be Confidential Information.

11.5 An approval or consent given by a party under this Confidentiality Agreement shall only be valid if in writing and shall not relieve the other party from responsibility for complying with the requirements of this Confidentiality Agreement nor shall it be construed as a waiver of any rights under this Confidentiality Agreement except as and to the extent otherwise expressly provided in such approval or consent, or elsewhere in this Confidentiality Agreement.

SIGNATURE:	______________________________
NAME OF DELEGATED SIGNATORY: [print]	______________________________ In his capacity of
DESIGNATION OF SIGNATIORY: [print]	______________________________ Who warrants his authority to sign on behalf of
NAME OF BIDDER [COMPANY[:	______________________________
DATE:	______________________________

C. CERTIFICATE OF ACQUAINTANCE WITH BID DOCUMENTS

I/We ________________________________ of _____________________________ do hereby certify (Name of Company) that I/we acquainted myself/ourselves with the contents of all the documents listed in the Schedule of Bid Documents, as laid down by The South African Post Office for carrying out of the proposed works.

SIGNED AT ________________________ on this _______ day of ____________________ 2026.

SIGNATURE: ____

NAME OF DELEGATED SIGNATORY: ____
[print] In his capacity of

DESIGNATION OF SIGNATIORY: ____
[print] Who warrants his authority to sign on behalf of

NAME OF BIDDER [COMPANY[: ____

DATE: ____

D.SPECIFICATION

1. BACKGROUND

The South African Post Office (SAPO) operates a layered risk financing strategy to mitigate potential losses and strengthen financial resilience.

SAPO retains all losses below the defined deductible threshold in-house, while the catastrophic layer, placed with external insurers, covers losses above this threshold. This deductible is set by the insurers providing cover for catastrophic events.

SAPO's risk financing objective is to optimise the cost of risk financing, including insurance, in alignment with its risk profile through conventional insurance placements. These placements are currently facilitated by SAPO's appointed Insurance Broker, with the aim of securing a cost-effective, bespoke insurance structure that supports SAPO's overall risk management program.

Typical short term insurance that is relevant for SAPO includes the following:

a. Motor Fleet
b. SASRIA
c. Assets All-Risk
d. Public Liability
e. Travel Insurance
f. Stated Benefits: Accidental Death Cover
g. Aviation Non-Ownership Liability
h. Directors and Officers Liability
i. Employment Practices Liability
j. Parcel Insurance
k. Commercial Crime Protection
l. Professional Indemnity
m. Cyber Crime Insurance
n. Cash-In-Transit Insurance [CIT]
o. Goods-In-Transit [GIT]
p. Parcel Insurance

2. OBJECTIVE

The objective of this bid is to appoint a suitably qualified service provider to act as SAPO's Insurance Broker for a period of three (3) years, with the option to renew annually. The award of this tender for a period of 36 months (3 years) is subject to the following conditions:

2.1 The initial contract term period shall be 36 months (3 years) from the date of appointment. Renewable annually
2.2 An annual service level performance review will be conducted. Continuation of the contract term into years' 2 and 3 is subject to the service provider achieving a minimum performance score of 90% against the agreed Service Level Agreement (SLAs) deliverables.
2.3 Pricing shall remain fixed for year 1 of the 3 year contract term period.
2.4 Any annual escalation applied MUST be aligned/correspond with the Consumer Price Index % as published by StatsSA during the contract term period.

Upon appointment, the successful Broker will be required to structure and place SAPO's conventional insurance cover in the market. This includes developing a comprehensive and holistic insurance programme that addresses the risk exposures of SAPO and all its subsidiaries.

The Service Level Agreement (SLA) between SAPO and the successful appointed service provider will be discussed and agreed upon as part of the contract negotiation process.

3. SCOPE OF WORK

3.1 Work Required

The services to be rendered as a Short Term Insurance Broker during the contracted term period of three (3) years (renewable after year one (1) subject to achieving a performance measurement score of 90% against agreed SLA deliverables including the remaining two (2) subsequent contract term years) include general insurance brokering services related to the assessment, placement, maintenance and administration of SAPO insurance portfolio. The scope of work will entail the following but not limited to:

3.1.1 Conduct internal and external consultations with relevant stakeholders to develop and finalise the renewal and maintenance strategy
3.1.2 Perform a full review of SAPO's insurance programme to evaluate whether current cover, limits, sub-limits, and sums insured are adequate relative to exposures and market standards. Provide a gap analysis and costed recommendations prior to annual renewal
3.1.3 To provide expert advisory services on the design and implementation of the most appropriate and cost-effective self-insurance strategy and structure, ensuring it aligns seamlessly with SAPO's conventional insurance programme and overall risk financing framework
3.1.4 Conduct a market exercise to obtain competitive renewal terms from multiple insurers through re-brokering of SAPO's insurance programme
3.1.5 Alignment of Insurance and Risk Management best practices
3.1.6 Source of a minimum of three (3) short term insurance market quotes to benchmark against current terms as and when required aligned with SAPO's risk profile requirements.
3.1.7 Presentation of renewal terms and recommended options
3.1.8 Written confirmation of binding cover for 100% of the risk prior to inception date
3.1.9 Deliver proposal on most appropriate risk financing structure/s for SAPO (including proposed timelines and cost of implementation) in time by no later than 31 August 2026 in order to place relevant covers with an inception date being 1 October 2026
3.1.10 When, requesting a minimum of three (3) quotations to only approach insurers and/or re-insurers with high solvent ratio's (credit ratings) in the A range. In the event that insurers and/or re insurers with the required A range credit ratings do not respond to request for quotations, this must be communicated and declared in writing to SAPO. The appointed broker/service provider must at all times be able to provide proof of the solvency (credit) rating confirmed in the A range of all insurers and/or re insurers that offer terms on the SAPO portfolio.
3.1.11 Provide a detailed allocation of premiums per section of cover and disclose all service fees
3.1.12 Compile and provide a detailed insurance manual, including a full summary of cover, limits, conditions, and exclusions, in soft copy format
3.1.13 Review and examine issued policy for contractual and statutory/legislative compliance
3.1.14 Day-to-day correspondence and queries
3.1.15 Monitor premium payments and refunds in accordance with accounts and statement
3.1.16 Provide information sharing and awareness sessions for SAPO Risk Management staff as required, covering amongst other policy conditions, procedural manuals, and periodic updates on insurance market trends, including major market players, mergers, acquisitions, and other developments affecting cover and pricing.
3.1.17 Perform **annual risk engineering surveys** on a minimum of three SAPO properties to evaluate physical exposures, loss prevention controls, and mitigation strategies. Submit detailed reports with findings and recommendations, and provide ongoing advisory support on risk improvement, underwriting requirements, and industry best practices in loss control.
3.1.18 Actuarial evaluation of whole structure with associated recommendations.
3.1.18 Provide awareness sessions and information packs on related insurance and Risk Management principles as well as periodic regular updates on insurance related industry information.

4. DELIVERABLES

The appointed service provider must successfully deliver the following:
4.1 Holistic, comprehensive and most cost effective insurance renewal placement terms at least by 31 August 2026 based on the exercise performed as described in point 5.7.
4.2 Manage and advocate for catastrophic claims above agreed thresholds, including notification, insurer liaison, interim payment facilitation, and end-to-end negotiation to ensure fair, timely settlement
4.3 Optimal actuarial calculated insurance structure with aggregate and other structures annually
4.4 Risk engineering surveys of at least three (3) buildings must be conducted annually or alternatives may be presented that provide for similar insights
4.5 Provide information sharing and awareness sessions on policies as required as per 4.1.16 and 4.1.19. The appointed service provider must develop an information manual which SAPO can utilise to train operational staff on related insurance and Risk Management principles;
4.6 Provide ad-hoc insurance related advice when required;

4.7 Present a minimum of three (3) quotations from insurance companies/ underwriting agents for benchmarking against SAPO's current terms and for aligned with SAPO's risk profile requirements using pre - qualification evaluation criteria and the public procurement preference point scoring system (price & specific goals).

4.8 Management and settlement of claims above the deductible/ excess level in line with applicable insurance covers/ policies in place.

5. DUE DILIGENCE/PRESENTATION

SAPO reserves the right to conduct a due diligence and/or request the bidder to do a presentation of their bid offering in order to verify the information submitted and confirm compliance with the scope of work as contained in the specification. The bidder will be disqualified should the information submitted not be verifiable and/or be found non–compliant to the scope of work as contained in the specification.

E. EVALUATION CRITERIA

The bid will be evaluated as follows:

Phase 1: Gatekeeping Criteria
Phase 2: Bid Conditions
Phase 3: Commercial – Price [80] and Specific Goals [20]
Phase 4: Due Diligence / Presentation

1. PHASE 1: GATEKEEPING CRITERIA

The Bidder is required to provide SAPO with the following in their bid proposal. Failure to comply with the Gate-keeping Criteria will result in the disqualification of the bid.

Bidders must complete Pricing Schedule (Annexure A) in full in the Bid Document pack.

2. PHASE 2: BID CONDITIONS

The bidders must provide the following documentation with their bid proposals. Should the bidder fail to submit at the time of closing of the bid, bidder/s will be requested to re-submit the outstanding bid condition/s document(s) and Failure to resubmit during the evaluation period will result in the disqualification of their bid.

The Bidders must submit the following documents with their proposals.

2.1 Conformance to Specification [Annexure BC]

The bidder must submit a letter on their company letterhead confirming that they will comply with SAPO bid specification.

Bidders must complete and submit **Annexure BC** as confirmation of compliance with the SAPO bid specification as contained in the bid document.

2.2 Proof of Registered Financial Service Provider – FSP License

The bidding company must be registered as a Financial Service Provider under the Financial Advisory and Intermediary Services Act of 2002. The bidder must provide proof and submit their FSP License issued by the FSCA in the name of the bidding company confirming that the bidder is authorised to provide financial advice or intermediary services in South Africa under the FAIS Act.

The bidding company must maintain a FSP status of “Authorised” on the bid closing date. Failure to comply with the bid requirement will result in the disqualification of the bid

2.3 Proof of Broker Professional Indemnity Cover

The bidder must provide proof of Broker Professional Indemnity Insurance Cover that exceeds the value of **R 250 million.**

The proof of Broker Professional Indemnity Insurance Cover issued by the Insurer/s must be “Active” and valid on the bid closing date. Failure to comply with the bid requirement will result in the disqualification of the bid

2.4 Proof of Insurance Brokerage Service Experience [Asset value ≥ R 2 Billion] [Annexure BB]

The bidder must provide at least one [1] signed client reference letters on the client’s letterhead, confirming a minimum of five (5) years’ completed experience in providing brokerage insurance placements for entities/companies with an asset value **exceeding R 2 billion**.

Bidders must use the **Annexure BB** Template in the bid pack and provide to their clients for completion as confirmation of a minimum of five (5) years’ completed experience in providing brokerage insurance placements for entities/companies with an asset value **exceeding R 2 billion**.

2.5 Proof of Placement and Management Experience of Cell Captive and Contingency Insurance Cover [≥ R 150 Million]
[Annexure CC]

The bidder must provide at least two (2) signed client reference letters on the client's letterhead confirming a minimum of five (5) years' completed experience in placing and managing:

a) First-party and Third-party Cell Captive Insurance Cover, and
b) Contingency Insurance Cover that includes:

- Contingent business interruption and contractual contingency **exceeding the value of R 150 million.**

One (1) of the minimum two (2) signed client reference letters provided must be from a Public Institution listed in PFMA Schedule 2 (Major Public Entities).

Bidders must use the **Annexure CC** Template in the bid pack and provide to their clients for completion as confirmation of minimum of five (5) years completed experience in placing and managing a) first-party and third-party Cell Captive Insurance Cover and b) Contingency Insurance Cover that includes contingent business interruption and contractual contingency **exceeding the value of R 150 million.**

2.6 Proof pf Placement Experience of Directors and Officers [D&O] Insurance Cover [≥ R 600 Million]

The bidder must provide proof from an Insurance Company (on their Company letterhead) that confirms that the bidder (Broker) has successfully placed Directors and Officers (D&O) Insurance Cover that **exceeds the value of R 600 million.**

2.7 Proof of Placement Experience of Marine and Aviation Insurance Cover

The bidder must provide proof from an Insurance Company (on their Company letterhead) that confirms that the bidder (Broker) has successfully placed:

- Marine Insurance Cover
- Aviation Insurance Cover

2.8 Proof of Experience in Management and Settlement of Insurance Claims [≤ R 50 million]
[Annexure CR]

The bidder must provide at least two (2) signed client reference letters on the client's letterhead, confirming the bidders experience in the management and settlement of large claims in **excess of R 50 million**.

Bidders must use the **Annexure CR** Template in the bid pack and provide to their clients for completion as confirmation of experience in in the management and settlement of large claims in **excess of R 50 million**.

2.9 Qualification and Experience of Proposed Team Compliment assigned to the project

The proposed resources assigned to the project (except the Actuarial Resource) must have a minimum of five (5) years completed experience in providing brokerage insurance services and must be registered with the FSCA.

The proposed resources assigned to the project (except the Actuarial Resource) must provide proof of their registration with the FSCA by submitting their Regulatory Examination certificate confirming that the individuals are licensed to either provide financial advice or services (RE 5 – Representatives) and/or are responsible for the operations of an FSP (RE 1 – Key Individuals).

These proposed resources must maintain a status of "Authorised" Representatives and/or Key Individuals registered with FSCA on the bid closing date. Failure to comply with the bid requirement will result in the disqualification of the bid.

Bidders must submit CV's of the proposed resources that will be assigned to the project to confirm the minimum of five (5) years completed experience in providing brokerage insurance services.

2.10 Proof of Qualification and Experience of Proposed Actuary assigned to the project

The proposed Actuarial resource assigned to the project must have a minimum of five (5) years completed experience in providing actuarial services and be registered with the Actuarial Society of South Africa (AS-SA).

Proof of valid registration with the Actuarial Society of South Africa (AS-SA) must be submitted with the bid. The proof of registration must be valid on the bid closing date.

The CV of the proposed Actuarial resource assigned to the project must be submitted to confirm the minimum of five (5) years completed experience in providing actuarial services.

2.11 Central Supplier Database

Bidders must be registered on the National Treasury Central Supplier Database (CSD). If the bidders are not registered the bidder can register online at the following website www.csd.gov.za to upload mandatory information as required.

Note: That if your CSD indicate that you are government employees SAPO will not be able to conduct a business with your company, your proposal will be disqualified

2.12 SBD Forms

- Bidders must complete and submit SBD1 – Invitation to Bid
- Bidders must complete and submit SBD4 – Bid Bidders Disclosure

2.13 Tax compliance requirements

SAPO will not do business with a supplier who is not tax complaint. A CSD MAAA number provided by the bidder on the SBD1 form, will enable SAPO to verify a bidder’s tax compliance status. Seven (7) working days for tax compliance shall apply from the date the request was sent by SAPO.

2.14 Restricted Supplier on all National Treasury Platforms

SAPO shall disqualify bidders that are on the National Treasury list of restricted suppliers in all national treasury platform

3. PHASE 3: COMMERCIAL [PRICE AND SPECIFIC GOALS]

The specific goal that this project seeks is to appoint a service provider/s that are as follows;

- At least ≥ 51% Black owned or more.
- At least ≥ 51% Youth owned.
- At least ≥ 51% Women owned.
- At least ≥ 1% owned by disabled person(s)

Note: Tenderers who do not submit specific goal requirements with their bid proposal submitted on the specified bid closing date will not be disqualified from the bid evaluation process. Tenderers will not score points out of 20 for the specific goals, but zero (0) points will be scored.

The following will **be used to assess the specific goal**;

Criteria	Weight	Sub-criteria
Total price	80/100	Benchmark against lowest quote
Contribution to Specific Goals	20/100	Points will be award to bidders goal table below:

Specific Goal	Points	Required Documents to be submitted for evaluation
Bidding Company is ≥51% Black owned or more.	10	BEE Certificate - **SANAS accredited OR** Signed Sworn Affidavit by a Commissioner of oaths (EMEs and QSEs).**OR** a DTI BBBEE Certificate (EMEs and QSEs).
Bidding Company is 51% Youth owned	5	BEE Certificate - **SANAS accredited OR** Signed Sworn Affidavit by a Commissioner of oaths (EMEs and QSEs).**OR** a DTI BBBEE Certificate (EMEs and QSEs).
Bidding Company is 51% women owned.	3	BEE Certificate - **SANAS accredited OR** Signed Sworn Affidavit by a Commissioner of oaths (EMEs and QSEs).**OR** a DTI BBBEE Certificate (EMEs and QSEs).
Bidding Company is 1% owned by disabled person	2	BEE Certificate - **SANAS accredited OR** Signed Sworn Affidavit by a Commissioner of oaths (EMEs and QSEs).**OR** a DTI BBBEE Certificate (EMEs and QSEs).

4. PHASE 4: DUE DILIGENCE/ PRESENTATION

SAPO reserve the right to conduct a due diligence and/or request the bidder to do a presentation of their bid offering in order to verify the information submitted and confirm compliance with the scope of work as contained in the specification. The bidder will be disqualified should the information submitted not be verifiable and/or be found non–compliant to the scope of work as contained in the specification.

F. ANNEXURE A: PRICING SCHEDULE

PLEASE REFER TO ATTACHED

ANNEXURE A: PRICING SCHEDULE FOR COMPLETION

- The Pricing Schedule must be completed in full and in the format provided

G. ANNEXURE BC

PLEASE REFER TO ATTACHED ANNEXURE BC TO BE COMPLETED IN FULL INCLUDING YOUR COMPANY LETTERHEAD AND COMPANY DETAILS IN SPACE INDICATED

- The Annexure BC must be completed in full and in the format provided, reminder to insert your company letterhead details in space indicated

H.ANNEXURE BB

PLEASE REFER TO ATTACHED ANNEXURE BB TO BE COMPLETED IN FULL BY YOUR CLIENT INCLUDING THEIR COMPANY LETTERHEAD AND COMPANY DETAILS IN SPACE INDICATED

- The Annexure BB must be completed in full and in the format provided, reminder to insert your company letterhead details in space indicated

I. ANNEXURE CC

PLEASE REFER TO ATTACHED ANNEXURE CC TO BE COMPLETED IN FULL BY YOUR CLIENT INCLUDING THEIR COMPANY LETTERHEAD AND COMPANY DETAILS IN SPACE INDICATED

- The Annexure CC must be completed in full and in the format provided, reminder to insert your company letterhead details in space indicated

J. ANNEXURE CR

PLEASE REFER TO ATTACHED ANNEXURE CR TO BE COMPLETED IN FULL BY YOUR CLIENT INCLUDING THEIR COMPANY LETTERHEAD AND COMPANY DETAILS IN SPACE INDICATED

- The Annexure CR must be completed in full and in the format provided, reminder to insert your company letterhead details in space indicated

K.RETURNABLE DOCUMENTS

Returnable Documents means all the documents, and Annexures, as listed in the tables below. There are three types of returnable documents as indicated below and Respondents are urged to ensure that these documents are returned with their bids. The section contains bookmarks for ease of reference.

1. ADMINISTRATIVE DOCUMENTS

Respondents are required to submit with their bid submissions the following Administrative Documents, and also confirm submission of these documents by so indicating [Yes or No] in the tables below:

Administrative Returnable Documents	Submitted [YES OR NO]
Completed SBD 1	
Completed SBD 4	
Completed Confidentiality and Non-Disclosure	
Completed Certificate of Acquaintance with bid Requirements	
Latest CSD Report / MAAA number	
SARS Tax Compliance Certificate	

2. EVALUATION DOCUMENTS

2.1 Gatekeeping Criteria

The bidder is required to comply with the gatekeeping criteria to be eligible for further evaluation. **Failure to comply with the gate-keeping criteria will result in the disqualification of the bid.**

Gatekeeping Returnable Documents	Submitted [YES OR NO]
Pricing Schedule Annexure A	

2.2 Bid Condition Documents

The bidders must provide the following documentation with their bid proposals. Should the bidder fail to submit at the time of closing of the bid, bidder/s will be requested to re-submit the outstanding bid condition/s document(s) and Failure to resubmit during the evaluation period will result in the disqualification of their bid.

Failure to comply will result in the disqualification of their bid.

Bid Conditions Returnable Documents	Submitted [YES OR NO]
Bidders must complete and submit **Annexure BC** as confirmation of compliance with scope of work as mentioned on this document.	
The bidder must complete and submit **Annexure BB** from at least two (2) signed client reference letters on the client's letterhead, confirming a minimum of five (5) years' completed experience in providing brokerage insurance placements for entities/companies with an asset value **exceeding R 2 billion**.	
The bidder must complete and submit **Annexure CC** from at least two (2) signed client reference letters on the client's letterhead confirming a minimum of five (5) years' completed experience in placing and managing	

The bidder must complete and submit **Annexure CR** from at least two (2) signed client reference letters on the client's letterhead, confirming the bidders experience in the management and settlement of large claims in **excess of R 50 million**.	
Bidders must be registered as a Financial Service Provider under the Financial Advisory and Intermediary Services Act of 2002.	
The bidder must provide proof of Broker Professional Indemnity Insurance Cover that exceeds the value of **R 250 million.**	
The bidder must provide proof from an Insurance Company (on their Company letterhead) that confirms that the bidder (Broker) has successfully placed Directors and Officers (D&O) Insurance Cover that **exceeds the value of R 600 million.**	
The bidder must provide proof from an Insurance Company (on their Company letterhead) that confirms that the bidder (Broker) has successfully placed: • Marine Insurance Cover • Aviation Insurance Cover	
The proposed resources assigned to the project (except the Actuarial Resource) must provide proof of their registration with the FSCA by submitting their Regulatory Examination certificate confirming that the individuals are licensed to either provide financial advice or services (RE 5 – Representatives) and/or are responsible for the operations of an FSP (RE 1 – Key Individuals).	
Proof of valid registration with the Actuarial Society of South Africa (AS-SA) must be submitted with the bid. The proof of registration must be valid on the bid closing date. The CV of the proposed Actuarial resource assigned to the project must be submitted to confirm the minimum of five (5) years completed experience in providing actuarial services.	

2.3 <u>Points for Specific Goals</u>

Tenderers who do not submit specific goal requirement will not be disqualified from the bid process, but they will score zero (0) points out of 10/20 for the specific goal.

Required Documents to be submitted for Evaluation	Submitted [YES OR NO]
Valid BBBEE Certificate – **SANAS accredited** or **Signed Sworn Affidavit by a Commissioner of Oath** [EME's and QSE's] or a **CIPC/DTI BBBEE Certificate** [EME'S and QSE'S]	
Is your company a Joint Venture [i.e. Incorporate / Unincorporated], if "**ÝES**" submit a consolidated BBBEE Certificate to earn the relevant point[s]	