



uMLALAZI MUNICIPALITY

TENDER NO. : KZN ULM 16/25/26

TENDER DOCUMENT FOR:

PROVISION OF SHORT TERM INSURANCE SERVICES FOR A PERIOD OF 36 MONTHS

CLOSING DATE: 04 NOVEMBER 2025 AT 12:00

COMPILED BY: Finance Department P O BOX 37 Hutchinson Street, Eshowe, 3815	SCM OFFICES ADDRESS KV Challenor Street (Industrial Areas) ESHOWE, 3815
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SERVICE PROVIDER'S DETAILS:

NAME OF SERVICE PROVIDER	
CONTACT PERSON	
E-MAIL ADDRESS	
TELEPHONE NUMBER	
PHYSICAL ADDRESS	
POSTAL ADDRESS	

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1. NOTICE



UMLALAZI MUNICIPALITY

Notice Number: 26/25/26

INVITATION FOR THE SUBMISSION OF TENDERS

Tenderers are hereby invited in terms of Section 112 of the Local Government: Municipal Finance Management Act 56 of 2003 read with uMlalazi Supply Chain Management Policy to undertake the following:-

TENDER DESCRIPTION	TENDER NUMBER	CLOSING DATE AND TIME	FUNCTIONALITY
Provision of short term insurance services for a period of 36 months	KZN ULM 16/25/26	04 November 2025 at 11 KV Challenor Street, Eshowe at 12h00	<ul style="list-style-type: none">• Establishment of company = 15• Bidders previous experience in rendering Insurance services in the Public Sector/Municipal environment = 30• Qualifications and experience of key personnel = 10• Proof of company/individual registration with Financial Intermediaries Association (FIA) = 10

Eligibility: Only bidders with a license issued by Prudent Authority (PA) registered in terms of section 126 of Financial Sector Regulation Act No.9 of 2017 (FSRA).

Compulsory Note: Successful bidder will be required to establish an office in KwaZulu-Natal.

Sealed tenders endorsed **tender number and description** must reach the Municipal Manager, uMlalazi Municipality, and must be hand delivered and placed in the Tender Box at the Municipal Buildings, KV Challenor Street, Eshowe by no later than **12h00** on the above stipulated dates.

This tender will be evaluated based on returnable documents, functionality and price where 80/20 point system as per stipulated specific goals of this tender in terms of Preferential Procurement Regulations, 2022.

Specific Goals: -

NO.	Categories	Weight	80 20
1.	Ownership Goals: <ul style="list-style-type: none"> • BBEE Level 1 • BBEE Level 2 • BBEE Level 3 & Below 	100% 60% 20%	10 6 2
2.	Reconstruction & Development Programme Goals: Job Creation and Community upliftment <ul style="list-style-type: none"> • Community upliftment project (e.g. housing , schools ,infra donations etc.) equal to at least 0.5% of project Value 	100%	4
3.	Promotion of Local Business(s): <ul style="list-style-type: none"> • Enterprise Located within the uMlalazi Local Municipality • Enterprise Located within the King Cetshwayo District Municipality • Enterprise Located within the Province 	100% 50% 25%	4 2 1
4.	Combination of other goals: <ul style="list-style-type: none"> • EME or QSE which is at least 100% owned by black people; and Community upliftment project (e.g. housing , schools ,infra donations etc.) equal to at least 0.5% of project Value 	100%	2
		100%	20

Registration on the Councils Database is preferred prior to the submission and closing of the tender. It is the responsibility of the Tenderer to ensure that the Data Base registration documents are received by the Supply Chain Management Office. Further information in this regard can be obtained from the Supply Chain Management Unit on 035 – 473 3300 ext. 3445. Tenderers are requested to register on Central Supplier Database (CSD)

Tender documents are available on E-Tenders Portal at no cost. The purchased tender documents must be collected **at the Municipal offices Financial Services Revenue Section, Hutchinson Street, Eshowe on Monday to Fridays from 08:30 to 14:30. Tender Documents will be available from 06 October 2025 up to 28 October 2025 at a non-refundable cost of R1000.00.** EFT payments will be accepted and must be made on or before 16:00 pm on the last day of purchasing tender document. Payment may be deposited to uMlalazi Municipality as per the following banking details; First National Bank; Account Number 52191090523, Branch 220230, use company name as reference. **Proof of payment will required to receive tender document.**

There will be no briefing session, for further information or clarities contact Londiwe Khoza on **035 473 3300 (3319)** or email: londiwek@umlalazi.gov.za during normal office hours.

Late tenders, telegraphic or facsimiled tenders will **NOT** be accepted. Canvassing in the gift of Municipality is strictly prohibited and will lead to disqualification of tenders. Umlalazi Local Municipality does not bind itself to accept the lowest bid or any other bid and reserves the right to accept the whole/ part of the bid.

MR. N.N. SHANDU

MUNICIPAL MANAGER

Display date: 02 October 2025

Notice Number: 26/25/26

Definitions

The following terms shall be interpreted as indicated:

- (i) **“Closing time”** means the date and hour specified in the bidding documents for the receipt of bids.
- (ii) **“Contract”** means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
- (iii) **“Contract price”** means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
- (iv) **“Corrupt practice”** means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.
- (v) **“Countervailing duties”** are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
- (vi) **“Country of origin”** means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
- (vii) **“Day”** means calendar day.
- (viii) **“Delivery”** means delivery in compliance of the conditions of the contract or order.
- (ix) **“Delivery ex stock”** means immediate delivery directly from stock actually on hand.
- (x) **“Delivery into consignees store or to his site”** means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
- (xi) **“Dumping”** occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.
- (xii) **“Force majeure”** means an event beyond the control of the supplier and not involving the supplier’s fault or negligence and not foreseeable, events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.
- (xiii) **“Fraudulent practice”** means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.
- (xiv) **“GCC”** means the General Conditions of Contract.

- (xv) “**Goods**” means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
- (xvi) “**Manufacture**” means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
- (xvii) “**Order**” means an official written order issued for the supply of goods or works or the rendering of a service.
- (xviii) “**Project site**,” where applicable, means the place indicated in bidding documents.
- (xix) “**Municipality or Client**” means the organization purchasing the goods and services.
- (xx) “**Republic**” means the Republic of South Africa.
- (xxi) “**SCC**” means the Special Conditions of Contract.
- (xxii) “**Services**” means those functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.
- (xxiii) “**Written**” or “in writing” means handwritten in ink or any form of electronic or mechanical writing.
- (xxiv) “**Certified copy**” means true and accurate representation of original by an authorized person (Not a copy of a certified copy).

2. INSTRUCTIONS AND CONDITIONS OF TENDER

2.1 ELIGIBILITY

Only bidders with a license issued by Prudent Authority (PA) registered in terms of section 126 of Financial Sector Regulation Act No.9 of 2017 (FSRA).

2.2 RETURN OF DOCUMENT

The completed and signed set of Tender Documents shall be sealed in an envelope endorsed **“PROVISION OF SHORT TERM INSURANCE SERVICES FOR A PERIOD OF THIRTY (36) MONTHS”** must reach the Municipal Manager, uMlalazi Municipality, by hand and placed in the Tender Box at the SCM offices, KV Challenor road (Industrial Area), by no later than 12:00 pm on the date as per advert where they will be opened in public. NB: Late tenders, telegraphic or facsimile tenders will not be considered.

2.3 COMPLETION OF TENDER DOCUMENT

- Tender document must duly completed in very manner
- Forms in this tender document must be completed and signed.
- All pages allocated signing spaces must be signed

2.4 AUTHORITY FOR SIGNING

Authority to sign the documents on behalf of the tenderer must be submitted with the tender and remain in force unless replacement submission is made and accepted by the municipality.

2.5 ACCEPTANCE OF TENDERS

- 2.5.1. The Bidder or a competent authorised representative of the Professional Service Provider who submitted the tender has attended the compulsory briefing meeting (if applicable to this tender).
- 2.5.2. The tender offer is signed by a person authorised to sign on behalf of the Bidder.
- 2.5.3. A Bidder who submitted a tender as a Joint Venture if accepted in the bid document, must include an acceptable Joint Venture Agreement in this bid.
- 2.5.4. Acceptance of the tender will not guarantee that the programme, methods and other details will be approved. Municipality may consider reviewing such prior entering into a contract agreement.
- 2.5.5. The Municipality does not bind itself to accept the lowest or any other bid and reserves the right to accept the whole part of the bid.
- 2.5.6. The uMlalazi Municipality will not be held responsible for any cost incurred for submitting this tender.
- 2.5.7. Failure to comply with the foregoing instructions may lead to the tender not being considered.
- 2.5.8. When the bid is accepted, the successful tenderer will be informed and the contract negotiated indicating the financial implications and terms of service will be entered into.
- 2.5.9. **In terms of Section 38 of the Supply Chain Management Policy the Municipality reserves the right to reject any Bid:**
 - (i) If any municipal rates and tariffs or municipal service charges owed by that Company owner or any of its directors to the municipality or municipal entity or to any other municipality or municipal entity are in arrears for more than 3 (three) months.

- (ii) Who in last 5 (five) years has failed to perform satisfactory on a previous contract with the municipality or municipal entity or any other organization of state after written notice was given to that Service Provider that performance was unsatisfactory.

2.5.10. Canvassing in gift of Municipality is strictly prohibited and will lead to disqualification of the Proposal.

2.5.11. Registration on the Councils Database shall be mandatory to the successful bidder. This will apply on final award of this tender.

2.6 LIST OF COMPULSORY RETURNABLE DOCUMENTS TO BE SUBMITTED BY TENDERER

Item	Description	Remark
A.	Proof of purchase of tender document (Compulsory to purchased tender document only)	Compulsory, if applicable
B.	Valid tax clearance certificate (original) valid as at date of tender closing	Compulsory
C.	Company / CC /Trust / Partnership / Registration certificates and Certified copies of identity document of Directors / Owners / Members / Shareholders, Joint Venture Agreement and Power of Attorney in case of Joint Ventures	Compulsory
D.	Proof of registration with CSD	Compulsory
E.	Rates Clearance Certificate	Compulsory
F.	Proof of Workman's Compensation Registration	Compulsory
G.	Preferential Procurement Points claim from in terms of the preferential procurement regulations 2022	Compulsory
H.	Verification documents for Preferential Procurement Points for specific goals (refer to MBD 6.1)	Further evaluation
I.	Declaration of interest	Compulsory
J.	Declaration of Bidders past Supply Chain Management practices	Compulsory
K.	Certificate of Independent Bid Determination	Compulsory
L.	Agreement in terms of section 37(2) of the occupational health and safety act no 85 of 1993	Compulsory
M.	Audited annual financial statements if offer is above R10 Million	Compulsory, if applicable
N.	MBD5 Declaration For Procurement Above R10 Million (All Applicable Taxes Included)	Compulsory, if applicable
O.	Copy of certificate issued by Financial Sector Conduct Authority (FSCA)	Compulsory
P.	Proof of Fidelity Guarantees and Professional Indemnity Cover (cover limit R100 Million and above)	Compulsory
Q.	Valid registration with Institute of Risk Management South Africa (IRMSA)	Compulsory
R.	Certificate of authority to sign documents	Compulsory
S.	Excess schedule and conditions applicable based on different types of assets and their values as per asset register (for further evaluation)	Compulsory
T.	Record of addenda to tender document	Compulsory
U.	Amendments or qualifications by the tenderer if applicable	Compulsory

2.7. EVALUATION METHOD

- a) Compulsory returnable documents.
- b) Functionality
- c) Price and preferential procurement system as specified in the bid.

2.8.VALIDITY PERIOD

The tender undertakes that bid will be valid for a period of **Ninety (90)** days and that the Tenderer will not retract or change the tender during the period that the uMlalazi Municipality is scrutinizing the acceptance thereof.

2.9.COMPETENCE OF KEY PERSONNEL AND QUALITY

- 2.9.1.** To carry out and complete work the Professional Service Provider shall employ only such person as are careful competent and efficient in their various professions. All key personnel presented by the tenderer during bidding stage for evaluation purposes must be maintained or remain unchanged for the duration of the contract “ no substitution without municipality’s written approval will be allowed”
- 2.9.2.** Appointed bidder will be required to maintain all quality presented during bidding process which has significantly influenced decision making in awarding of this tender, this shall be part of the service level agreement.

2.10. LOCATION AND GEOGRAPHICAL SIZE OF THE MUNICIPALITY

The administrative center of uMlalazi Local Municipality (KZN284) (Eshowe) is situated along the north eastern coast of Kwa Zulu Natal, 140km north east of Durban. Umlalazi municipality is located within King Cetshwayo District. Geographically, the municipal area covers 2 217km² and consist of 28 electoral wards with dominance of rural wards, and there are 14 tribal authority areas of which AmaKhosi are custodians thereof on behalf of the Ingonyama Trust Board.

2.11. INSPECTION

The successful tenderer must be acquainted with uMlalazi Municipality area. The service provider must make his own arrangements to familiarize themselves with area of work.

2.12. PAYMENT INSTRUCTION:-

- 2.12.1.** No payment will be made if such work fall outside the ambit of the contract and approved **Contract Price**, all variation orders must be approved in writing by a person authorized to do so.
- 2.12.2.** Payment will be made by the municipality to the Service Provider upon delivery of service, which payment will be made via electronic transfer of funds to the Service Provider’s financial institution subject receipt of a valid tax invoice accompanied with relevant supporting documents specified in this contract.

- 2.12.3. Premiums will be paid annually except for insurance cover additions made during the year.
- 2.12.4. The Service Provider is obliged to submit the invoice together with all supporting documents required by Project Manager including deliverables.
- 2.12.5. Valid tax invoice must be submitted on the last day of the 3 month and payment shall be made in 30 days after date of invoice.
- 2.12.6. In the event that the Municipality is not satisfied with the performance of the Service Provider, the Municipality shall give written notice to this effect to the Service Provider providing sufficient detail and a reasonable time frame to enable the Service Provider to rectify such performance.
- 2.12.7. In the event of the entire amount or a portion of the invoice being disputed by the Municipality, only the portion in dispute shall be withheld from payment, until the dispute is resolved. The undisputed portion shall be paid to the Service Provider within the stipulated time frames.
- 2.12.8. The Service Provider shall immediately give notice of any circumstances preventing them from completing their obligations in terms of the contract.

2.13. **PENALTIES**

- 2.13.1. If the service provider fails to perform any or all services within the period(s) specified in the contract, the Municipality shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, an amount of **R500 per calendar day** of the delay until actual delivery or performance. The Municipality may also consider applying termination clause of the contract should non-compliance with delivery timeframes constitutes gross breach of this contract.
- 2.13.2. Failure to deliver the goods or service within the period(s) specified in the contract as a result of an event of force majeure, the service provider must report in writing with evidence required and Municipality shall assess the submission on its discretion.
- 2.13.3. Notwithstanding the provisions of **penalties and termination Clauses**, the supplier shall not be liable for forfeiture of its performance security, damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

2.14. **AMENDMENTS UPWARD OF TENDERED PRICE**

- a) Tenders must further note and accept that any variance upward of the prices tendered will not be considered by Municipality as a reason to amend the said tendered price.

- b) Any attempts to invoke an increase in tendered price will render the tender invalid and it will be discarded.

2.15. COST OF TENDER

The Municipality does not hold itself liable for any or all of the costs involved by the tender in compiling a tender. Should a tender withdraw an offer after being given written acceptance thereof all costs of re-advertising will be for that tenderer's account.

2.16. ALTERNATIVE

Should a tenderer wish to submit an alternative, he may do so subject to the tender being submitted additional to and based on the specifications as listed in the tender document. Any letter or documents describing such alternative must be in duplicate.

2.17. MANDATORY OBJECTION PERIOD

All administrative actions and decisions taken by the Municipality through its officials may become subject to an appeal process. As such, in terms of Section 62 of the Municipal Systems Act 32 of 2000, a period of fourteen (14) days will be set aside to allow for the submission of appeals against the award / process of making the award to a particular bidder by any interested party. Except in scenarios where the decision of a duly appointed appeal panel sets aside the appointment of the successful bidder as the service provider for this contract, the appointment will then be confirmed by the municipality in writing.

2.18. OTHER GENERAL TERMS AND CONDITIONS OF THIS BID

- 2.18.1.** Awarding of contract will be subject to the Service Provider's acceptance of offer in writing.
- 2.18.2.** Project personnel requirements will be confirmed during project initiation and shall remain unchanged for the duration of the project, unless prior written consent has been granted by the Municipality.
- 2.18.3.** All secretarial services such as arranging meetings, setting of agenda's and minute taking shall be the responsibility of the Service Provider.
- 2.18.4.** No material or information derived from the provision of the services under the contract may be used for any other purposes except for those of the uMlalazi Local Municipality except where duly authorized to do so in writing by the uMlalazi Local Municipality.
- 2.18.5.** The successful Service Provider agrees to keep all records and information of, or related to the project confidential and not disclose such records or information to any third party without the prior written consent of uMlalazi Local Municipality.

2.19. CONTRACT AGREEMENT/SERVICE LEVEL AGREEMENT

The successful Service Provider shall sign a Service Level Agreement/ Contract with the

Municipality.

3. SPECIFICATIONS OF TENDERS

3.1. BACKGROUND

Bids are invited from suitable experienced and qualified service providers to submit proposal for the provision of short term insurance for the period of thirty six (36) months.

3.1.1 SCOPE OF WORK

Scope of work includes all assets as listed in the Assets Register but not limited to:-

A) Assets and Liabilities

- To cover all tangible property belonging to the municipality or in which the municipality has any pecuniary interest against loss or damage caused by fire or allied perils, including electronic breakdown, including assets and all risks.
- Electronic equipment, including laptops and mobile electronic equipment, licensed software, etc.
- Municipal Fleet: Comprehensive cover on all vehicles owned, leased or used by the insurer.
- Third-party insurance.
- Towing services in cases of accidents and field breakdown within a 2-hour time frame and the instruction of the delegated municipal official.
- Money cover
- Commercial Property/Building cover, SASRIA, property terrorism and sabotage, fire, explosion, earthquake, power surges, alterations and additions etc.

B) Employee Liability

- The professional indemnity cover for uMlalazi Local Municipality Councillors, Municipal Manager, Senior Managers, Senior Officials, Specialists, and all other Employees of the Municipality.
- Fidelity Guarantee, to cover direct financial loss due to acts of fraud, forgery, alteration, robbery and safe burglary, computer fraud or dishonesty by employees resulting in dishonest personal financial gain.
- Public Liability, to protect the Municipality against third-party claims involving illness, injury.

C) Stated Benefits (estimate numbers subject to change)

- Category A: 453 permanent employees with the prospects of increasing or decreasing. Circumstances: (i) Death = 3 X annual earnings. (ii) Permanent disability= such % of 3x annual earnings as is specified for that disability. (iii) Medical expenses.
- Category A: 55 councilors. Circumstances: (i) Death = 2x annual earnings. (ii) Permanent disability= such % of 2x annual earnings as is specified for that disability. (iii) Medical expenses

D) Cyber Liability

- Provision of cover for losses and liability arising from cyber incidents like data breaches, ransomware attacks and email interception, protecting the municipality from financial, operational, and reputational harm.

E) Provision of car hire/ courtesy car services for the Mayor, Deputy Mayor and Speaker.

- Provision must be made for car hire services for Mayor, Deputy Mayor and Speaker like-for-like, as per the attached fleet list, following mechanical breakdowns/damages, damages due to accidents and public riots, theft and hijacking, as well as unforeseen losses/damages caused by natural acts.
- Assets Insurance (Coverage for all municipal building, equipment, IT infrastructure and other immovable/movable assets)
- Motor vehicle and plant insurance (Comprehensive cover for municipal fleet, trucks, fire engines, graders, tractors and other vehicle)
- Public Liability Insurance (Cover for third party injuries, property damage and related claims).
- Fidelity Guarantee Insurance (Cover for losses arising from fraud, theft)
- Money Insurance (Cover for cash in transit, cash on premises and related risks).
- Business Interruption Insurance (Cover for loss of income or increased costs due to interruptions cost by in short events)
- Any additional covers that may arise due to changes in municipal operations

3.1.2 EXPECTED DELIVERABLES, PROJECTS IMPLEMENTATION AND TIME FRAMES

3.1.2.1. The successful bidder is expected to have fully insured Municipal assets immediately at the inception of the policy and proof of cover be submitted to the Municipality.

3.1.2.2. The successful bidder must be able to provide the following general insurance actions and administration of the insurance portfolio:

- a) Claim administration; once the Bidder is awarded to an Insurance Broker, such broker will be responsible to handle all aspects of the insurance claims.
- b) Claims that are rejected by the insurance company must be supported by a motivation by the Broker based on legal grounds.
- c) The Municipality reserves the right to reconsider any opinion received, to refer it back to the broker for another opinion or recommendation.
- d) Facilitate policy adjustments and endorsements on sums insured and additions to insurers as and when required.
- e) Handling of day-to-day correspondence and queries between the municipality and the insurer.
- f) Monitor premium payments and refunds in accordance with accounts and statements.
- g) Keep the municipality up to date with latest amendments to the Legislation on Insurance (if required through workshops);
- h) Management of online claims system and provision of access to delegated officials of the Municipality.

- i) Reassessment – successful bidder must facilitate the reassessment of the basis value of motor vehicles annually, at renewal or anniversary date.

3.1.2.3. The successful bidder must adhere to the following turnaround times:

Administration of claims (non-motor)

Activity	Time frame
Acknowledge receipt of claim forms and confirm registration of claims in writing (via email) to the municipality	Within 24 hours after receipt of the notification of the incident.
If the claim is accepted by the Insurer an Agreement of Loss will be generated and forwarded to the Insurance Section within the municipality.	Within 3 (three) working days after receipt of all the applicable documentation and claim has been accepted by the Insurer.
In cases where no Agreement of Loss is applicable, forward an authorization letter to the relevant officials within the municipality	Within 7 (seven) days after receipt of all the applicable documentation and claim has been accepted by the Insurer.
Monthly reporting; taking into consideration identification of bottlenecks claims and tracking outstanding claims amongst others; Reports must be provided monthly to the Insurance Section within the municipality	By the 5th working day of the following month, in respect of all claims outstanding, detailing the progress with an indication of the outstanding information to finalise the claim.
Respond to all follow-ups/ inquiries from the Municipality	Within 24 hours.

Motor Accidents

Activity	Time frame
Register the claim and provide claim number	2 working days after receiving request
Appoint an assessor for the vehicle after receiving all documents	5 working days
Authorise vehicle after assessment	5 working days
Repair Vehicle	20 working days
Payment of excess/ full damage to the Service Provider	5 working days
Settle written-off vehicle	30 Working days from the day the vehicle is declared uneconomical to repair
Towing services in cases of field breakdown of vehicles	Within 2 hours after the instruction of the responsible municipal official at that time

Windscreens/Glass

Activity	Time frame
Register Claim	2 working days
Authorisation	2 working days
Repair	2 working days

3.1.3 TERMS AND CONDITIONS

- (i) The Broker may not suggest any other insurance base, or any alternatives not contained in the document of tender and only this document may be used. Any deviation from this will result in the disqualification of appointment.
- (ii) Unless otherwise specified, it is accepted in the case of every type of policy tendered for, that the tenderer will be willing to underwrite the individual policy type at the premium tendered, without any other policies being granted to him.
- (iii) The specimen wording of the policy must be attached.
- (iv) If a long-term agreement is entered into, it should be possible for either of the parties to cancel it with the appropriate penalties.
- (v) Successful bidder must disclose upon inception of the contract any condition related or applicable to claims.
- (vi) The details of property, amount insured, et cetera furnished herein is according to the information, which is currently available. However, the Council reserves the right to change details, if necessary, at the final placement of the insurance, as well as during the period of the contract.
- (vii) All premiums should be rounded off to the nearest full rand. If extensions are granted free of charge, the entry in the column should read "free of charge". If the tender does not include an extension, the entry in the premium column should read "no tender". All premiums MUST INCLUDE VAT.
- (viii) The Broker must disclose the Insurer on each policy.
- (ix) The Tenderer must indicate how many local authorities' insurance is at present being handled by him and should cite a few examples with references of contact persons.
- (x) The Broker must indicate:
 - a. How many members of staff are in the Broker's employ countrywide?
 - b. How much experience do the members of your staff who will be dealing directly with the Council, have of handling the insurance of Local Authorities?
 - c. Which office will be handling the Council's portfolio?

- (xi) Provide full details of your professional indemnity insurance arrangements.
 - Indemnification Limit – minimum R100 Million.
 - Excess
 - Insurers
 - Renewal Date
- (xii) Annual premium review shall be agreed upon by both parties, the municipality reserves the right to terminate the contract should no mutual agreement is reached.
- (xiii) Tenderers must submit the excess schedule and conditions applicable based on different types of assets and their values as per asset register.

3.1.4 CLAIMS HISTORY

From a period of 01 January 2022 to 31 August 2025

Settled and closed claims

DOL	Claim Notification	Description of Loss	Event	Cover	Peril	Gross	Paid	Outstanding
02-Feb-2024	05-Feb-2024	Front bumper, head light, fender and driver's door damaged	Accidental Damage	TruckSure	Accidental Damage	-	-	-
21-Sep-2024	11-Oct-2024	Min sub transformer damaged	Damage	Buildings Combined	Accidental Damage to machinery	-	-	-
20-Jun-2024	27-Jun-2024	A tall tree fell and damaged the brick wall that is along the corner boundary of the property and landed on the roof of the veranda	Liability	Public Liability	Liability	-	-	-
26-Nov-2024	20-Dec-2024	Driver hit by TP vehicle	Accidental Damage	TruckSure	Accidental Damage	1 414,50	1 414,50	-
20-Nov-2023	22-Nov-2023	Vehicle collided with a tractor	Accident	TruckSure	Accident	-	-	-
07-Oct-2024	24-Oct-2024	Truck crushed from behind	Accident	TruckSure	Accident With Third Party	-	-	-
17-Jan-2024	02-Feb-2024	The Driver failed to stop the Tractor on two ways stop at Sunnydale. The front bumper, head light and passenger door on a private vehicle NES 14542 were damaged.	Accident	TruckSure	Accident With Third Party	-	-	-
07-Oct-2024	06-Nov-2024	TLB damaged the wall	Liability	Public Liability	Liability	-	-	-
28-Jul-2023	24-Aug-2023	Municipal truck damaged third party vehicle	Third Party Liability	TruckSure	Accident With Third Party	1 322,50	1 322,50	-
07-Sep-2023	14-Sep-2023	Rear windscreen of the tractor damaged	Accidental Damage	TruckSure	Accidental Damage	-	-	-
22-Jan-2025	04-Feb-2025	Driver hit by third party	Accident	TruckSure	Accident With Third Party	-	-	-
11-Jun-2025	24-Jun-2025	Insured vehicle was involved in an accident.	Accident	TruckSure	Accident	-	-	-
27-Dec-2023	08-Feb-2024	Corner dented, right back head lights broken	Accidental Damage	TruckSure	Accidental Damage	-	-	-
02-Feb-2024	07-Feb-2024	Accident on blind corner	Accident	TruckSure	Accidental	-	-	-
14-Aug-2025	19-Aug-2025	Accident	Accident	TruckSure	Accident	99 000,00	-	99 000,00
19-Apr-2024	17-May-2024	Driver collided with a tree, while reversing from a driveway	Accidental Damage	TruckSure	Accidental Damage	183 314,22	165 115,05	-
26-Oct-2024	29-Oct-2024	Laptop stolen	Theft	Business All Risks	Theft	23 699,00	21 199,00	-
06-Jan-2024	18-Mar-2024	Laptop stolen	Theft	Business All Risks	Theft	22 999,00	20 499,00	-
06-Jun-2025	24-Jun-2025	Tractor moved with hand brake	Accident	TruckSure	Accident	11 787,50	1 787,50	-
14-Mar-2025	17-Mar-2025	Vehicle was badly damaged in an accident	Accident	TruckSure	Accident	26 629,49	21 629,49	0,00
22-Jan-2025	03-Feb-2025	Driver of the Third Party lost control and crashed onto our Municipal vehicle NES 15588. The front left side of our Municipal vehicle was damaged.	Accident	TruckSure	Accident With Third Party	60 959,99	55 721,76	0,00
11-Aug-2023	16-Aug-2023	Laptop stolen	Theft	Business All Risks	Theft	18 000,00	18 000,00	-
20-Nov-2023	20-Nov-2023	third party bumped into the insureds vehicle damaging the back of the vehicle	Accident	TruckSure	Accident	245 888,38	221 507,46	-
20-Sep-2023	26-Sep-2023	TP reversed on to municipal vehicle	Accident	TruckSure	Accidental Damage	14 117,93	9 117,93	-
11-Aug-2023	22-Aug-2023	Vehicle hit on the left side	Accidental Damage	TruckSure	Accidental Damage	196 822,50	177 272,50	-
27-Dec-2023	18-Jan-2024	Broken light and dent on the corner of the vehicle	Accident	TruckSure	Accident	34 140,98	29 140,98	- 0,00
13-Jul-2023	15-Aug-2023	The vehicle has scratches, front light smashed	Accidental Damage	TruckSure	Accidental Damage	36 137,44	36 137,44	-
18-Oct-2023	02-Nov-2023	The vehicle was unattended and lost its brakes and rolled and hit objects and was damaged	Accident	TruckSure	Accidental Damage	344 359,64	313 054,22	0,00
21-Dec-2023	04-Jan-2024	Municipal vehicle was involved in an accident with third party	Accident	TruckSure	Accident With Third Party	54 961,74	49 961,74	0,00
28-May-2024	30-May-2024	Municipal vehicle collided with private vehicle	Accident	TruckSure	Accident With Third Party	109 651,79	98 818,86	- 0,00
04-Nov-2024	18-Nov-2024	Laptop damaged	Accidental Damage	TruckSure	Accidental Damage	2 819,00	319,00	-
13-Apr-2024	23-Apr-2024	Insured collided with animals	Accident	TruckSure	Accidental Damage	34 855,90	29 855,90	-
11-Jun-2025	24-Jun-2025	Driver accidentally bumped a pedestrian	Accident	TruckSure	Accident	99 000,00	-	99 000,00

Repudiated claims

DOL	Claim Notification	Description of Loss	Claims Status	Event	Peril
18-Nov-2024	29-Nov-2024	Stolen laptop	Repudiated	Theft	Stolen
26-Sep-2023	28-Sep-2023	Damaged laptop	Repudiated	Damage	Impact
25-Mar-2024	11-Apr-2024	Driver failed to stop the truck and it got damaged	Repudiated	Accidental Damage	Accidental Damage

Third party claims not taken up

DOL	Claim Notification	Description	Claims Status	Event	Cover	Item Handler	Peril
30-Sep-2023	27-Nov-2023	A tree fell on	Not Taken Up	Liability	Public Liability	Khensani Valoyi	Liability

Open claims

DOL	Claim Noti	Description of Loss	Event	Peril	Gross	Outstanding
12-Aug-2025	27-Aug-2025	A vehicle that was standing at a stop sign suddenly accelerated and collided with the municipal vehicle	Accident	Accident	99 000,00	99 000,00
14-Aug-2025	27-Aug-2025	Headon collision	Accident	Accident	99 000,00	99 000,00
03-Feb-2025	19-Feb-2025	Insured saw a crack on the center section of the laptop screen	Accidental Damage	Cause unknown	34 250,00	34 250,00
24-Sep-2024	11-Oct-2024	Switch 474 is burnt	Damage	Electrical/M	500 000,00	300 000,00
28-Jul-2025	22-Aug-2025	An intoxicated pedestrian appeared to be crossing the road, knocked off by a meter taxi and fell against the rear side of the truck	Liability	Liability	50 000,00	50 000,00
28-Apr-2025	26-May-2025	A sink water pipe burst in the ladies toilet	Burst Geyser/Water Pipes and or Apparatus	Burst water	50 000,00	50 000,00
19-Jun-2025	24-Jun-2025	Insured laptop was stolen from the office.	Windscreen	Theft	23 000,00	23 000,00
20-May-2025	02-Jun-2025	Municipal laptop taken at gun point	Theft	Theft	20 699,00	20 699,00

3.1.5 MOTOR VEHICLE AND PLANT ABOVE R500 000.00

Description	Asset Cl	Classification Description	AFS Account	Serial Number	Purchase Date	Purchase Price
MOTOR VEHICLE CRANE TRUCK	Vehicles	Trucks	Property, Plant and Equipment	NES 13396	2016/05/05	1 103 735,00
Toyota Hino 4 ton truck - CB 60 LH ZN	Vehicles	Trucks	Property, Plant and Equipment	CB60LH ZN	2016/06/27	590 000,00
MOTOR VEHICLE LDV ISUZU KB - NES 13893	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 13893	2016/11/24	509 671,20
MOTOR VEHICLE TRUCK ISUZU - CG30TJ-ZN	Vehicles	Motor Vehicles	Property, Plant and Equipment	CG30TJ-ZN	2016/11/23	761 114,00
MOTOR VEHICLE FIRE ENGINE	Vehicles	Emergency Vehicles	Property, Plant and Equipment	NES 4523	2017/01/04	2 050 417,23
MOTOR VEHICLE TRUCK ISUZU NPR 400 - NES 14499	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 14499	2017/12/21	561 506,06
TRACTOR	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 4339	2019/04/24	576 733,11
TOYOTA LAND CRUISER	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 14235	2020/02/27	738 922,41
TRACTOR TAFE 8502	Vehicles	Tractors	Property, Plant and Equipment	NES 15589	2020/03/23	629 522,88
CHEERRY PICKUP TRUCK - NES 9226	Vehicles	Trucks	Property, Plant and Equipment	NES 9226	2020/03/25	966 171,80
REFUSE TRUCK WITH CAGE - BG50HH-ZN	Vehicles	Trucks	Property, Plant and Equipment	BG50HH-ZN	2020/03/25	719 845,00
TOYOTA HILUX 4X4 - BJ22BX ZN	Vehicles	Motor Vehicles	Property, Plant and Equipment	BJ22BX ZN	2020/05/07	528 288,13
TOYOTA HILUX 4X4 - NES 15444	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 15444	2020/05/07	528 287,89
TOYOTA HILUX 2.4GD6 - NES 12770	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 12770	2020/05/07	641 650,31
LWB TRUCK - CB 60 KR ZN	Vehicles	Trucks	Property, Plant and Equipment	CB60KR ZN	2020/03/25	1 086 165,34
TOYOTA HILUX - CX 46 YT – ZN	Vehicles	Motor Vehicles	Property, Plant and Equipment	CX 46 YT – ZN	2020/06/26	516 472,97
TOYOTA HILUX	Vehicles	Motor Vehicles	Property, Plant and Equipment	CL 46 YR ZN	2020/06/29	556 956,59
TOYOTA HILUX - CX 47 BS - ZN	Vehicles	Motor Vehicles	Property, Plant and Equipment	CX 47 BS - ZN	2020/06/29	592 822,49
TOYOTA HILUX - NES 9087	Vehicles	Motor Vehicles	Property, Plant and Equipment	NES 9087	2020/06/29	506 017,33
TOYOTA FORTUNER	Vehicles	Motor Vehicles	Property, Plant and Equipment	CB 60 LX ZN	2020/11/25	720 786,65
TRUCK REFUSE COMPACTOR - NES 16286	Vehicles	Trucks	Property, Plant and Equipment	NES 16286	2021/03/11	1 777 000,00
TRUCK REFUSE COMPACTOR	Vehicles	Trucks	Property, Plant and Equipment	NES 16286	2021/03/11	1 777 000,00
FORD EVEREST - CB 60 LN ZN	Vehicles	Motor Vehicles	Property, Plant and Equipment	CB 60 LN ZN	2020/11/12	688 718,00
TOYOTA LANDCRUISER	Vehicles	Transport Assets	Property, Plant and Equipment	NES 17128	2023/06/02	615 838,38
TOYOTA PRADO - NES 8251	Vehicles	Transport Assets	Property, Plant and Equipment	NES 8251	2023/08/23	1 070 967,00
MOTOR GRADER - NES 16811	Vehicles	Transport Assets	Property, Plant and Equipment	NES 16811	2023/08/23	4 220 793,00
MOTOR GRADER - NES 17525	Vehicles	Transport Assets	Property, Plant and Equipment	NES 17525	2023/08/23	4 220 793,00
TRACTOR LOADER BACKHOE - BB 70 WF ZN	Vehicles	Transport Assets	Property, Plant and Equipment	BB 70 WF ZN	2023/08/23	864 287,80
VIBRATING DRUM	Vehicles	Trucks	Property, Plant and Equipment		2023/08/23	1 347 454,00
HYDROLIC EXCAVATOR	Vehicles	Trucks	Property, Plant and Equipment		2023/08/23	1 886 213,00
UD water tank truck - BH 15 HF ZN	Vehicles	Transport Assets	Property, Plant and Equipment	BH15HFZN	2023/11/17	2 029 693,00
TIPPER TRUCK	Vehicles	Transport Assets	Property, Plant and Equipment	BH 25 JC ZN	2023/11/17	2 255 211,00
LANDINI TRACTOR - NES 15859	Vehicles	Transport Assets	Property, Plant and Equipment	NES 15859	2023/08/23	1 740 192,00
UD TRUCK TRACTOR - BD 76 BY ZN	Vehicles	Trucks	Property, Plant and Equipment	BD 76 BY - ZN	2024/03/07	1 542 500,00
LOWBED 30 TON - CG46KN-ZN	Vehicles	Trailers And Accessories	Property, Plant and Equipment	CG46KN-ZN	2024/03/08	1 041 736,00
						41 963 482,57

3.2. PROJECT DURATION

3.2.1 The agreed contract period will be thirty six (36) months

3.3. MONITORING, REPORTING REQUIREMENTS AND PERFORMANCE MANAGEMENT

3.3.1 Monitoring, reporting requirements and performance includes but not limited to:

- (i) Submit monthly claims progress report
- (ii) The service provider should be available to present progress reports during the contract.

3.3.2 Format of communication - All requests for formal approval from the Employer, or any other body, shall be submitted in writing in hardcopy format. Interim payment claims shall be submitted in the same format, accompanied by an original tax invoice. Ad-hoc communication between the Employer and the Service Provider may be conducted per facsimile or in electronic format (e-mail).

3.4 PRICING INSTRUCTIONS

3.4.1 Annual escalation percentage shall be based on the current risk assessment and the rate (%) applicable to calculate premium as a baseline.

3.4.2 Annual premium review shall be agreed upon by both parties, the municipality reserves the right to terminate the contract should no mutual agreement is reached.

3.4.3 Premiums may vary based on insurance cover additions made during the year in line with the existing cover.

3.4.4 **The offer will be all inclusive and be based on the pricing schedule. No additional services will be paid.**

3.4.5 Tenderers must submit the excess schedule and conditions applicable based on different types of assets and their values as per asset register.

3.4.6 It is the responsibility of the bidder to have knowledge of additional services that are not stated in the pricing schedule or form of offer prior submitting the bid.

3.4.7 Tenderers to submit tender prices in accordance with the description, requirements of each project specifications issued by the Municipality.

3.4.8 All prices quoted shall be inclusive of Value Added Tax (VAT) if the contractor is registered as vat vendor.

3.4.9 Vendors not registered for Value Added Tax with SARS will be treated as Non VAT vendors.

3.4.10 Bidders submitting quotation should be registered with Central Suppliers Database, CSD number must be supplied. If supplier is not registered they cannot be considered. If supplier wants to be registered with CSD they must go to www.csd.gov.za and get themselves registered.

4. PRICING SCHEDULE

COMBINED			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
Buildings including office building or structures and property	R 369 296 007		
Non Standard Construction	R 6 381 963		
Sub- Station, mini subs, transformers	R 234 735 709		
Street and Traffic lights	R 9 445 139		
Community facilities (Churches, sport fields,)	R 311 259 983		
All water purifications, pump station	R9 317 357		
Jojo tank & Stands	R 3 284 578		
Fencing	R 41 535 336		
Property specifically insured	R59 456 250		
Other Specified Property (other structures)	R62 298 801		
Air conditioners	R 2 195 414		
Heritage assets	R 14 431 850		
Sport & recreation	R 56 050 617		
Bus shelters and Rank	R 16 238 536		
Standby Generator	R 1 637 597		
Non-standard structure	R 4 070 694		
Private dwellings, residential units hostels, Flats	R 35 241 385		
Non Standard - Thatch (Contents)			
Private dwellings, residential units hostels, Flats			
Private dwellings, residential units & etc - (Contents)			

Capital Additions			
Extensions			
Subsidence and Landslip	Yes		
Sum insured	R 250 000		
Motor Vehicles whilst parked at Insured			
Sum Insured	R 1 000 000		
Riot and Strike (other than RSA and Namibia)	No		
Leakage of oils, chemicals or other fluids	Yes		
Theft of immovable property			
Malicious damage			
Temporary repair cost	R 1000 000		
Wash basins	R 1 000 000		
Thatch structures unless specifically insured	R 100 000 Max Annual Limit		
Reasonable Precautions	R 20 000		
Claims preparation cost	R 100 00		
TOTAL BUILDING COMBINED	R 1 240 267 216		
Business Interruption			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
Income	R 99 000 000		
Gross rentals			
Increase in Cost of Working	R 200 000		
Additional Increase in Cost of Working	R 200 000		
Extensions			
Specified suppliers / sub-contractors			
Sum insured	R 1000 000		
Unspecified suppliers / sub-contractors			
Sum insured			
Specified Customers			
Sum insured	R 1000 000		
Public Utilities			
Sum insured	R 1000 000		
Fines and Penalties			
Claims Preparation Costs			
TOTAL BUSINESS INTERRUPTION	R 102 400 000		

Office Contents			
Contents insured property	R 10 846 459		
Theft (forcible & violent entry or exit)	R 1000 000		
Loss of Rent (up to 25% of sum insured)	Included		
Loss of Documents	R 100 000		
Legal Liability (Documents)	R 100 000		
Capital Additions	R 1000 000		
Extensions			
Subsidence and Landslip	Yes		
Sum insured	R25 000		
Riot and Strike (other than RSA and Namibia)	No		
Leakage of Oils, Chemicals or other fluids	R 5000		
Locks and Keys	R 7 500		
Malicious Damages	R 50 000		
Reasonable precautions	R 10 000		
Claims Preparation Costs	R 100 000		
TOTAL OFFICE CONTENTS	R 13 243 959		
Accounts Receivable			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
Extensions			
Duplicate Records			
Protections			
Riot and Strike (other than RSA and Namibia)			
Claims Preparation Costs	R 100 000		
TOTAL ACCOUNTS RECEIVABLE	R 110 100 000		
Business all risk			
Property of the Insured or for which they are responsible whilst anywhere in the world (as per the schedule),	R 16 702 086		

excluding laptops and cellphones			
Laptops	R 4 360 633		
Cellphones & Tablets	R 1 039 003		
Cameras	R 265 655		
Fire arms	R 560 0780		
Mayoral Chain	R 1 666 853		
Extensions			
Increase in Cost of Working	Yes		
Sum Insured	R 15 000		
Riot and Strike (other than RSA and Namibia)	No		
Locks and Keys	R 7 500		
Claims Preparation Costs	R 100 00		
TOTAL BUSINESS ALL RISKS	R 24 716 808		

DETAILS	SUM INSURED (R)	RATE (%) applicable to calculate premium	Premium (Year 1)
First loss basis	R 100 000		
Extensions			
Property in the open	R 20 000		
Theft of employee property			
Malicious damage	R 200 000		
Locks & Keys	R 10 000		
Reasonable precautions	R 75 000		
Claims Preparations Costs	R 100 000		
TOTAL	R 505 000		

THEFT			
First loss Limit	R 100 000		
Extensions			
-Property in the open	R 20 000		
Theft of employee property			
Malicious Damage	R 200 000		
Reasonable Precautions	R 10 000		
Locks and Keys	R 75 000		
Claims Preparation Costs	R 100 000		
TOTAL THEFT	R 505 000		

GLASS			
All fixed internal & external glass at the premises	R 100 000		

Extensions			
Riot and Strike (other than RSA and Namibia)			
Claims Preparation Costs	R 100 000		
TOTAL GLASS	R 200 000		
.MONEY SECTION			
DETAILS	SUM INSURED (R)	RATE (%) applicable to calculate premium	Premium (Year 1)
Major limit			
Possession of Councillors/Employees away from insured premises on a business trip	R 7 500		
On the premises outside business hours in locked safe	R 20 000		
Loss of or damage to crossed cheques, money or postal			
Loss of or damage to money at any other time			
Major limit	R 363 000		
Point of sales	R 250 000		
Receptacles as a result of theft of money or attempt			
Locks and keys	R 7 500		
Reasonable precautions	R10 000		
Credit cards			
Personal Accident (Assault)			
Capital Sum	R 10 000		
Weekly Amount	R 1 000		
Medical Expenses	R 5 000		
Riot and Strike (other than RSA and Namibia)			
Electronic Vending machines			
Claims Preparation Costs	R 100 000		
TOTAL MONEY	R 874 000		

Fidelity Guarantee			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)

Retroactive Cover			
Superseded Policy	NO		
Reinstatement Amount	NO		
Cost of Recovery			
Claims Preparation Costs	R 100 000		
TOTAL FIDELITY GUARANTEE	R 210 000		

Accidental Damage			
Total value of property			
Limit of indemnity			
Extensions			
First Loss Average	NO		
Excluded property (in addition to property excluded in policy)	NO		
Claims Preparation Costs	R 100 000		
TOTAL ACCIDENTAL DAMAGE	R 100 000		

Goods in Transit			
Load Limit	R 252 000		
Extensions			
Removal of Debris	R 5 000		
Fire, Explosion, Collision and overturning			
Fire Extinguishing Expense	R 10 000		
Claims Preparation Costs	R 100 000		
TOTAL GOODS IN TRANSIT	R367 000		

Group Personal Accident - 24 Hours			
Councillors spouse	55		
Volunteer workers			
Protection services	56		
Benefits			
Death - Councillors	R 250 000		
Permanent Disability	% of Death benefit as specified for particular disability		
Temporary Total Disablement	R per week max 104 weeks		
Medical expenses	R 20 000		
Additional death benefit	R 20 000		
Relocation	R 20 000		
Repatriation	R 20 000		

Mobility	R 20 000		
Extensions			
War Risks	No		
Claims Preparation Costs	R 100 000		
Maximum Limit Any One Life	R 2 000 000		
Maximum Limit Any One event (Accumulation Limit)	R 10 000 000		
TOTAL GROUP PERSONAL ACCIDENT			

Stated Benefits			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
24 Hours (Employees)	R 214 234 000		
55 Councillors	R 26 398 000		
Benefits			
Death	4 x Annual earnings		
Permanent Disability	% of Death benefit as specified for particular disability		
Temporary Total Disablement	100% of average weekly earnings max 104 weeks		
Medical Expenses	R 20 000		
Additional death benefits	R 20 000		
Relocation	R 20 000		
Repatriation	R 20 000		
Mobility	R 20 000		
Extensions			
War Risks			
Claims Preparation Costs	R 100 000		
Maximum Limit Any One Life	R 5 000 000		
Maximum Limit Any One event (Accumulation Limit)	R 20 000 000		
TOTAL STATED BENEFITS			

Electronic Equipment			
Section	Sum Insured	RATE (%) applicable to	Premium (Year 1)

		calculate premium	
Laptops	R 4360 633		
Tablets	R 1 039 003		
CCTV	R 429 253		
Air conditioners			
Escalation			
Capital Additions			
Extensions			
Prevention of Access	No		
Increase in Cost of Working	R 50 000		
Reconstruction of Data	R 50 000		
Incompatibility			
Telkom access line			
Utilities (Failure of supply)			
Riot and Strike (other than RSA and Namibia)			
Claims Preparation Cost	R 100 000		
TOTAL ELECTRONIC EQUIPMENT			

Machinery Breakdown			
Specified Equipment - Limit	R 15 751 886		
Expediting Costs			
Extensions			
Stock Spoilage			
Damage to Surrounding Property			
Automatic Additions			
Claims Preparation Costs	R 100 000		
TOTAL MACHINERY BREAKDOWN			

Motor fleet Own Damage - value up to R500 000 - Comprehensive	COVER AS PER FLEET LIST ATTACHED		
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
Commercial vehicles	R		
LDVS	R		
Trucks	R		
Fire Engines	R		
Tractors	R		
Emergency Vehicles/Buses	R		

Motor Cycles	R		
Trailers	R		
Special type vehicles (road marking & construction vehicles, machinery, refuse removal, waste compactors etc)	R		
High value vehicles (First R 500 000.00)	R		
Car Hire 60 days	R		
Roadside Assistance	R		
Fire and Theft	R		
Extensions			
Wreckage removal			
Fire extinguishing expenses	R 10 000		
Medical expenses (per occupant)	R 5 000		
Loss of keys	R 5 000		
Conveyance of explosives			
Theft or attempted theft of radios/sound equipment	R 5 000		
Theft or attempted theft of telephones (excluding cell phones)	R 2 500		
Claims preparation costs			
TOTAL MOTOR OWN DAMAGE			

LIABILITIES

Public Liability			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
TOTAL Public Liability			
Sub-limits			
Wrongful Arrest and defamation	R 2 250 000		
Errors & omissions	R 2 250 000		
Products liability and defective workmanship	R 2 250 000		
Pedal Cycles	Market Value		
Legal Defence costs	R 2 250 000		
Professional Liability in respect of Medical	R 2 250 000		

Practitioners or other Medical officials			
Spread of fire			
Municipal Police liability	R 2 000 000		
Sub-limit use of firearms	R 2 250 000		
Sub-limit wrongful arrest & defamation	R 2 250 000		
Employers Liability			
Limit			
TOTAL Employers Liability			

Motor Third party Liability			
Section	Sum Insured	RATE (%) applicable to calculate premium	Premium (Year 1)
Number of vehicles			
TOTAL Motor Third Party Liability			

Sarsia councillors			
Sasria Assets			

Cyber liability cover	R 10 000 000		
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5. FORM OF OFFER

TENDER KZN ULM 16/25/26

The Municipal Manager
uMlalazi Municipality
P O Box 37
ESHOWE
3815

Sir,

I/We _____ do hereby tender for the
“**PROVISION OF INSURANCE SERVICES FOR A PERIOD OF 36 MONTHS**” per
specifications and scope of work in the tender document for an amount of:-

The offered premium per annum (Exclusive of VAT) R _____

VAT Amount (if VAT registered) R _____

The Total premium per annum (Inclusive of VAT) R _____
Total amount in words:

The above fees include all required information or resources to complete the tender as per the specifications.

Until such time that a formal agreement is compiled and accepted, these tenders will be in conjunction with your acceptance or the persons acting on your behalf and will be a binding contract between both parties.

Upon the terms set out in the conditions of tender, I/We hereby acknowledge that:-

1. I/We have read and acquainted myself/ourselves with the terms and conditions of tender and understand the purpose thereof and agree that all such conditions shall form part of this tender;
2. This Offer may be accepted by uMlalazi Municipality by signing the Form of Acceptance within the period of validity stated in this Tender document, whereupon the Tenderer becomes the **Service Provider** in terms of this this contract.

THE CONDITIONS OF TENDER I/WE READ AND ACCEPT

Signature (of person authorized to sign the tender):

Signature : <i>(of person authorized to sign the tender):</i>
Name: <i>(of signatory in capitals):</i>
Capacity: <i>(of Signatory):</i>
Name of Tenderer: <i>(organisation):</i>
Address:
Telephone number: Fax number:
Witness Signature:
Name: <i>(in capitals):</i>
Date:

[Failure of a Tender’s to sign this form will invalidate the tender]

6. FORM OF ACCEPTANCE

-Contract No: KZN ULM 16/25/26

By signing this part of the Form of Offer and Acceptance, the Employer identified below accepts the Tenderers Offer. In consideration thereof, the Employer shall pay the Contractor the amount due in accordance with the Conditions of Contract identified in the Contract data. Acceptance of the Tender's Offer shall form an agreement between the Employer and the Tenderer upon the terms and conditions contained in this Agreement and in the Contract that is the subject of this Agreement.

Signature : _____

Name (in capitals) : **MR N.N. SHANDU**

Capacity : **MUNICIPAL MANAGER**

Name of Employer : **uMLALAZI MUNICIPALITY**

Address : **P.O BOX 37**
ESHOWE
3815

Witness Signature : _____

Name (in capitals) : _____

Date : _____

7. FORMS TO BE COMPLETED BY THE TENDERER

COMPULSORY DOCUMENTATION

A.PROOF OF PURCHASE OF TENDER DOCUMENT

(Compulsory to purchased tender document only)

SIGNED ON BEHALF OF TENDERER:

B. TAX CLEARANCE

It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Services (SARS) to meet the bidder's tax obligations.

1. In order to meet this requirement, bidders are required to complete in full, the attached form TCC 001. 'Application for Tax Clearance Certificate' and submit it to any SARS branch office nationally. The Tax Clearance Certificate requirements are also applicable to foreign bidders/individuals who wish to submit bids.
2. SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
3. The original Tax Clearance Certificate must be submitted together with bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance will not be acceptable.
4. In bids where Consortia/Joint Ventures/ Sub-Contractors are involved, each party must submit a separate Tax Clearance Certificate.
5. Copies of the TCC 001 "Application for a Tax Clearance Certificate" forms are available from any SARS branch office nationally or on the website www.sars.gov.za
6. Applications for the Tax Clearance Certificate may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website www.sars.gov.za

SIGNED ON BEHALF OF TENDERER:

**C. COMPANY / CC / PARTNERSHIP / JV / SP REGISTRATION CERTIFICATES &
ID DOCUMENTS OF ALL DIRECTORS**

[NOTE: Registration Certificates for Companies, Close Corporations and Partnerships, or JV Agreements and Powers of Attorney for Joint Ventures, or ID documents for Sole Proprietors must be attached here. Tenderers must include certified ID copies of all directors, members and partners]

In addition to the above, the tenderer must insert here certified copy of identity documents of all directors

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

D. PROOF OF CENTRAL SUPPLIER DATABASE REGISTRATION

NOTE: attach full summary of CSD report

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

E. RATES AND MUNICIPAL SERVICES CLEARANCE CERTIFICATE

In terms of Clause 38 of the Supply Chain Management Policy the uMlalazi Municipality reserves the right to reject any tender if any municipal rates and tariffs or municipal service charges owed by that tenderer or any of its directors to the municipality or to any other municipality or municipal entity are in arrears for more than 3 (three) months.

Tenderers are required to submit proof of payment of municipal rates and tariffs for the municipality in which the business is situated/ located.

This serves to confirm that my **company's municipal rates and taxes are paid up to date and the following is attached:**

1. An copy of the most recent municipal statement not older than 3 months, indicating the status of payment of all municipal accounts and taxes, electricity, water, refuse, rates and levies, from the Municipality in which jurisdiction it's business is situated or;
2. In the case where the tenderer does not own property/is a tenant for the purpose of its business establishment, the tenderer to provide copy of lease agreement and a recent statement from its landlord certifying that all the tenants payments in respect of all municipal accounts and taxes i.e. electricity, water, refuse, rates and levies are paid up to date or;
3. In a case where the Service Provider cannot supply any of the above. The person would have to obtain a Rate Clearance Certificate from the Municipality that the person resides in. Service Provider would need a certified copy of the ID of all Directors and a certified copy of the company's CK Tendering, to obtain a certificate ; or
4. Tenders who are **not** registered with any municipality for the payment of rates and services due to their location may submit proof of residence / business address certified by a Municipal Councillor, but only if the residence is the same address as the business address; and

Attach proof to this page in terms of the above

SIGNED ON BEHALF OF TENDERER:

F. WORKMEN’S COMPENSATION

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

G. PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- 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).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender

to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (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).

FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20 or 90/10

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

Where

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmin = Price of lowest acceptable tender

3.1. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

POINTS AWARDED FOR PRICE

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

80/20 or 90/10

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

Where

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

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- 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
 - 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.

The specific goals will be applied in in terms of section 2(1)(a)(i) of the municipal supply chain policy to advance targeted groups as follows:

- Youth
- Women
- People living with disabilities
- Local businesses & SMME's

5.2.1 SUMMARY TABLE FOR CALCULATION OF PRERERENTIAL POINTS FOR SPECIFIC GOALS

			<R50 Million	>R50 Million
NO.	Categories	Weight	80 20	90 10
1	Ownership Goals	50%	10	5
2	Empowerment Goals	20%	4	2
3	Reconstruction & Development Programme Goals	20%	4	2
4	Other Goals (Specify)	10%	2	1
		100%	20	10

5.2.2 SPECIFIC GOAL NO.1-OWNERSHIP CATEGORY

#	Specific Goal(s)	Weight	80 20 PP	90 10 PP	Verification
	Ownership Categories :				

1	EME and QSE				
	1. an EME or QSE which is at least 100% owned by black people;	100%	10	5	Sworn Affidavit - QSE/EME General
	2. an EME or QSE which is at least 51% owned by black people;	60%	6	3	Sworn Affidavit - QSE/EME General
	3. an EME or QSE which is at 25% - 50% owned by black people;	20%	2	1	Sworn Affidavit - QSE/EME General
2	Broad Based Black Economic Empowerment :				
	BBBEE Level 1	100%	10	5	BBBEE Certificate
	BBBEE Level 2	60%	6	3	BBBEE Certificate
	BBBEE Level 3 & Below	20%	2	1	BBBEE Certificate
3	Ownership %				
a)	Women Ownership(*Must be South African)				
	ownership - 100% : Black (Youth , Women , Disabled People ,Military Veterans)	100%	10	5	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	ownership - > 51% : Black (Youth , Women , Disabled People ,Military Veterans)	80%	8	4	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	ownership - 25% - 50% : Black (Youth , Women , Disabled People ,Military Veterans)	40%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	ownership - 100% : White (Youth , Women , Disabled People ,Military Veterans)	20%	2	1	ID Copies : Directors Co. Registration CSD Shareholders Certificate
b)	Men Ownership(*Must be South African)				
	Men ownership - 100% : Black (Youth , Men , Disabled People ,Military Veterans)	80%	8	4	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	Men ownership - > 51% : Black (Youth , Men , Disabled People ,Military Veterans)	40%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	Men ownership - 25% - 50% : Black (Youth , Men , Disabled People ,Military Veterans)	20%	2	1	ID Copies : Directors Co. Registration CSD Shareholders Certificate
4	Youth Development : (Below 35 Years)				
	Youth ownership - 100% : Black	100%	10	5	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	Youth ownership - > 51% : Black	80%	8	4	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	Youth ownership - 25% - 50% : Black	40%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	Youth ownership - 100% : White	20%	2	1	ID Copies : Directors Co. Registration CSD Shareholders Certificate

5.2.3 SPECIFIC GOAL NO.2 –EMPOWERMENT CATEGORY

#	Specific Goal(s)	Weight	80 20	90 10	Verification
	Sub-Contracting :				
1	EME and QSE				
	1. an EME or QSE which is at least 100% owned by black people;	100%	4	2	Sworn Affidavit - QSE/EME General
	2. an EME or QSE which is at least 51% owned by black people;	50%	2	1	Sworn Affidavit - QSE/EME General
	3. an EME or QSE which is at 25% - 50% owned by black people;	25%	1	0,5	Sworn Affidavit - QSE/EME General
2	Local Economic Development Sub-Contracting (10%-30%) and 40 % where it is technically possible and subject to pre-approval.				

	1. Enterprise 100% owned by Youth	100%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	1. Enterprise 100% owned by Disabled People	100%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	1. Enterprise 100% owned by Women	100%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	2. Enterprise owned by Black People with CIDB Grading 4 or Less	100%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	3. Enterprise 100% owned by Military Veteran	100%	4	2	ID Copies : Directors Co. Registration CSD Shareholders Certificate
	3. Enterprise owned by Black Men with at least 51%	50%	2	1	ID Copies : Directors Co. Registration CSD Shareholders Certificate

5.2.4 SPECIFIC GOAL NO 3- RDP CATEGORY

#	Specific Goal(s)	Weight	80 20 PP	90 10 PP	Verification
	Reconstruction and Development :				
1	Promotion of Local Business(s)				
	1. Enterprise Located within the uMlalazi Local Municipality	100%	4	2	Utilities : Directors or Co. Affidavit Existing Lease Agreement /councilor or Induna letters
	2. Enterprise Located within the King Cetshwayo District Municipality	50%	2	1	Utilities : Directors or Co. Affidavit Existing Lease Agreement
	2. Enterprise Located within the Province	25%	1	0,5	Utilities : Directors or Co. Affidavit Existing Lease Agreement
2	SMME Development (EME and QSE)				
	1. an EME or QSE which is at least 100% owned by black people;	100%	4	2	Sworn Affidavit - QSE/EME General
	2. an EME or QSE which is at least 51% owned by black people;	50%	2	1	Sworn Affidavit - QSE/EME General
	3. an EME or QSE which is at 25% - 50% owned by black people;	25%	1	0,5	Sworn Affidavit - QSE/EME General
3.	Job Creation and Community upliftment				
	1.Community upliftment project (e.g. housing , schools ,infra donations etc.) equal to at least 0.5% of project Value	100%	4	2	Bidder to propose
	2. Creation of Jobs /Labour intensive activities	100%	4	2	Bidder to propose

SPECIFIC GOAL NO 4 – OTHER GOALS

#	Specific Goal(s)	Weight	80 20 PP	90 10 PP	Verification
	Other Categories :				
1	Combination of any other goals				
	User departments may combine any specific goals under categories 1,2 and 3 above in a manner that will help evaluate and apply preference points to the tender	100%	2	1	--Relevant Verification Documentation--

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)
	N/A		N/A	
Ownership Goals: # 1 <ul style="list-style-type: none"> • BBBEE Level 1 • BBBEE Level 2 • BBBEE Level 3 & Below 		10		
Reconstruction & Development Programme (RDP) Goals: Promotion of Local Business # 1 <ul style="list-style-type: none"> • Enterprise Located within uMlalazi Municipality • Enterprise Located within District Municipality • Enterprise Located within the Province 		4		
Reconstruction & Development Programme (RDP) Goals: SMME Development (EME and QSE) #2 <ul style="list-style-type: none"> • an EME or QSE which is at least 100% owned by black people • an EME or QSE which is at least 51% owned by black people • an EME or QSE which is at 25% - 50% owned by black people 		4		
Other Goals: Combination of other goals: #1 <ul style="list-style-type: none"> • an EME or QSE that is 100% owned by : Black (Youth , Women , Disabled People ,Military Veterans), residing within uMlalazi Municipality 		2		
TOTAL		20		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company

- ☐ Personal Liability Company
 - ☐ (Pty) Limited
 - ☐ Non-Profit Company
 - ☐ State Owned Company
- [TICK APPLICABLE BOX]

4.6. 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 Service Provider 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.

<p>.....</p> <p>SIGNATURE(S) OF TENDERER(S)</p> <p>SURNAME AND NAME:.....</p> <p>DATE:.....</p> <p>ADDRESS:.....</p> <p>.....</p>

**H. ATTACH DOCUMENTS VERIFICATION OF PREFERENTIAL PROCUREMENT
POINTS FOR SPECIFIC GOALS**

The bidder to attach documents required for verification of specific goals indicated on **table 1** of the preferential procurement points for specific goals (form MBD 6.)

SIGNED ON BEHALF OF TENDERER:

I. DECLARATION OF INTEREST

MBD 4

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:
.....
 - 2.2 Identity Number:
.....
 - 2.3 Position occupied in the Company (director, trustee, shareholder²):
.....
....
 - 2.4 Company Registration Number:
.....
...
 - 2.5 Tax Reference Number:
.....
 - 2.6 VAT Registration Number:
.....

- 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

¹“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Municipality of provinces; or
- (e) Parliament.

²“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

- 2.7 Are you or any person connected with the bidder presently employed by the state?

YES / NO

- 2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

.....

Name of state institution at which you or the person connected to the bidder is employed :

.....

Position occupied in the state institution:

.....

Any other particulars:

.....
.....
.....
.....

- 2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?

YES / NO

- 2.7.2.1 If yes, did you attached proof of such authority to the bid document?

YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

- 2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....
.....
.....
...

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?

YES / NO

2.8.1 If so, furnish particulars:

.....
.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.9.1 If so, furnish particulars:

.....
.....
.....
.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

YES/NO

2.10.1. If so, furnish particulars:

.....
.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES/NO

2.11.1. If so, furnish particulars:

.....
.....

.....
.....

3. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number / Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....
CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2.1 TO 2.3.1 ABOVE IS
CORRECT, AND THAT THE SIGNATORY TO THIS DOCUMENT IS DULY AUTHORISED.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF
PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS
DECLARATION PROVE TO BE FALSE.

.....
Signature Date

.....
Position Name of bidder

J. DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

MBD 8

- 1 This Standard Bidding Document must form part of all bids invited. V
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME).....

**CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION
FORM IS TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY
BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

K. CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

uMlalazi Municipality

(Name of Municipality / Municipal Entity)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market

- allocation)
- (c) methods, factors or formulas used to calculate prices;
- (d) the intention or decision to submit or not to submit, a bid;
- (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
- (f) bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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.
10. 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.

.....
Signature

.....
Date

.....
Position Name of Bidder

References

¹ Includes price quotations, advertised competitive bids, limited bids and tenders.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

L. OCCUPATIONAL HEALTH AND SAFETY AGREEMENT

AGREEMENT MADE AND ENTERED INTO BETWEEN UMLALAZI MUNICIPALITY (HEREINAFTER CALLED THE “EMPLOYER”) AND

(Contractor/Mandatory/Company/CC Name)

IN TERMS OF SECTION 37(2) OF THE OCCUPATIONAL HEALTH AND SAFETY ACT, ACT No. 85 OF 1993 AS AMENDED.

I,
representing

....., as an employer in its own right, do hereby undertake to ensure, as far as is reasonably practicable, that all work will be performed, and all equipment, machinery or plant used in such a manner as to comply with the provisions of the Occupational Health and Safety Act (OHSA) and the Regulations promulgated thereunder.

I furthermore confirm that I am/we are registered with the Compensation Commissioner and that all registration and assessment monies due to the Compensation Commissioner have been fully paid or that I/We are insured with an approved licensed compensation insurer.

COID ACT Registration Number:

OR Compensation Insurer: Policy No.:.....

I undertake to appoint, where required, suitable competent persons, in writing, in terms of the requirements of OHSA and the Regulations and to charge him/them with the duty of ensuring that the provisions of OHSA and Regulations as well as the Council's Special Conditions of Contract, Way Leave, Lock-Out and Work Permit Procedures are adhered to as far as reasonably practicable.

I further undertake to ensure that any subcontractors employed by me will enter into an Occupational Health and Safety Agreement separately, and that such subcontractors comply with the conditions set.

I hereby declare that I have read and understand the appended Occupational Health and Safety Conditions and undertake to comply therewith at all times.

I hereby also undertake to comply with the Occupational Health and Safety Specification and Plan.

Signed at on the day of 20.....

SIGNED BY/ON BEHALF OF CONTRACTOR - MANDATORY

M. ANNUAL FINANCIAL STATEMENTS

Attach Audited Financial Statements (AFS) not older than 24 Months

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

N. MBD5 DECLARATION FOR PROCUREMENT ABOVE R10 MILLION (ALL APPLICABLE TAXES INCLUDED)

MBD 5

DECLARATION FOR PROCUREMENT ABOVE R10 MILLION (ALL APPLICABLE TAXES INCLUDED)

For all procurement expected to exceed R10 million (all applicable taxes included), bidders must complete the following questionnaire:

1 Are you by law required to prepare annual financial statements for auditing? **YES/NO**

1.1 If yes, submit audited annual financial statements for the past three years or since the date of establishment if established during the past three years.

.....
.....
.....
.....
.....

2 Do you have any outstanding undisputed commitments for municipal services towards any municipality for more than three months or any other service provider in respect of which payment is overdue for more than 30 days? **YES/NO**

2.1 If no, this serves to certify that the bidder has no undisputed commitments for municipal services towards any municipality for more than three months or other service provider in respect of which payment is overdue for more than 30 days.

2.2 If yes, provide particulars.

.....
.....
.....
.....

3 Has any contract been awarded to you by an organ of state during the past five years, including particulars of any material non-compliance or dispute concerning the execution of such contract? **YES / NO**

3.1 If yes, furnish particulars

.....
.....
.....
.....

4. Will any portion of goods or services be sourced from outside the Republic, and, if so, what portion and whether any portion of payment from the municipality / municipal entity is expected to be transferred out of the Republic? ***YES / NO**

4.1 If yes, furnish particulars

.....
.....
.....
.....

CERTIFICATION

I, THE UNDERSIGNED (NAME)

.....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS
CORRECT.

I ACCEPT THAT THE STATE MAY ACT AGAINST ME SHOULD THIS DECLARATION
PROVE TO BE

FALSE.

Name of Bidder:

Position:

Date:

Signature:

O. CERTIFICATE ISSUED BY FINANCIAL SECTOR CONDUCT AUTHORITY

(Copy of certificate)

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

P. PROOF OF FIDELITY GUARANTEES AND PROFESSIONAL INDEMNITY COVER

(Cover limit R100 Million and above)

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

Q. VALID REGISTRATION WITH INSTITUTE OF RISK MANAGEMENT SOUTH AFRICA (IRMSA)

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

R. CERTIFICATE OF AUTHORITY TO SIGN DOCUMENT

The Municipal Manager
uMlalazi Municipality
P O Box 37
ESHOWE
3815

AFFIDAVIT

I _____ the undersigned hereby declare that by
resolution dated _____ I am authorized to sign these documents
on behalf of _____

SIGNED AT THIS DAY OF 2025

WITNESS

TENDERER

**S. EXCESS SCHEDULE AND CONDITIONS APPLICABLE BASED ON DIFFERENT
TYPES OF ASSETS AND THEIR VALUES AS PER ASSET REGISTER**

(For further evaluation)

ATTACH PROOF TO THIS PAGE

SIGNED ON BEHALF OF TENDERER:

T. RECORD OF ADDENDA TO TENDER DOCUMENTS

I / We confirm that the following communications received from the Employer or his representative before the date of submission of this tender offer, amending the tender documents, have been considered in this tender offer.

No.	Date	Title or Details
1		
2		
3		
4		
5		

Compulsory Note:

1. Addendum issued by Municipality comes part of this bid and it is compulsory to every bidder to submit it with the bid.
2. If the bidder did not receive addendum through the email address provided in the briefing attendance register on the date agreed, it is the responsibility of the bidder to send an email in the email address provided in this document to request the said addendum.

NAME:

POSITION:

SIGNATURE:

DATE:

(of person authorised to sign on behalf of the Tenderer)

U. AMENDMENTS OR QUALIFICATIONS BY TENDERER

PAGE	DESCRIPTION

If the tenderer does not wish to make any amendments to the tender documents nor any qualifications to his/her tender, the above space shall be crossed out and the words "NIL" written above the line.

NB: An amendment must leave the original document substantially intact.

SIGNED ON BEHALF OF TENDERER:

8. FUNCTIONALITY

Note: the bidder must achieve minimum of 77 % (50 Points) in functionality. The Table below reflects **evaluation functionality components** and the overall weighting on each **Criteria component** of the functionality are as follows:

Criteria	Basis of allocation	Point allocation	Verification Method
Establishment of company	10 years or more	15	Attach company profile and FSCA (Proof of experience in the Insurance sector)
	6 to 9 years	10	
	5 years	05	
Bidders previous experience in rendering Insurance services in the Public Sector/Municipal environment (from 2017 to current)	8 or more completed projects	30	Attach copies of the current and previous appointment letters with traceable references.
	5 to 7 completed projects	20	
	1 to 4 completed projects	10	
Qualifications and experience of key personnel	At least 3 key personnel with Degrees/Diplomas in Insurance, Broker or Financial Management (must have FAIS Regulatory exam certificate)	10	Attach key personnel Curriculum Vitae (CV) with certified copies of their qualifications.
	At least 3 key personnel with Certificates in Insurance, Broker or Financial Management (must have FAIS Regulatory exam certificate)	05	Attach key personnel Curriculum Vitae (CV) with certified copies of their qualifications.
Proof of company/ individual registration with Financial Intermediaries Association (FIA)	Valid registration with FIA	10	Certified copy of registration needs to be attached as a proof.
TOTAL POINTS		65	

8.1. ESTABLISHMENT OF COMPANY

Attach company profile and FSCA (Proof of experience in the Insurance sector)

SIGNED ON BEHALF OF TENDERER:

8.2. BIDDERS PREVIOUS EXPERIENCE

Attach copies of the current and previous appointment letters with traceable references.

SIGNED ON BEHALF OF TENDERER:

8.3.QUALIFICATIONS AND EXPERIENCE OF KEY PERSONNEL

Attach key personnel Curriculum Vitae (CV) with certified copies of their qualifications

NB: No point will be awarded if the current employer is not the bidding company

SIGNED ON BEHALF OF TENDERER:

8.4 PROOF OF COMPANY/ INDIVIDUAL REGISTRATION WITH FINANCIAL INTERMEDIARIES ASSOCIATION (FIA)

Certified copy of registration needs to be attached as a proof.

SIGNED ON BEHALF OF TENDERER: