



INDEPENDENT DEVELOPMENT TRUST

REQUEST FOR PROPOSALS

**PROCUREMENT OF A RISK MANAGEMENT AND SHORT-TERM INSURANCE INTERMEDIARY SERVICE PROVIDER
TO PROVIDE THE FOLLOWING COVER(S) FOR INDEPENDENT DEVELOPMENT TRUST (IDT): BOARD OF
DIRECTORS AND OFFICERS LIABILITY, AND OR EMPLOYERS PRACTICE LIABILITY AS WELL AS ALL MOVABLE/
IMMOVABLE ASSETS FOR A PERIOD OF THREE (3) YEARS**

RFP NO: IDT/CSU/FAC/29/012026

BIDDERS INFORMATION

Company Name	
Contact Person	
Cell / Tel Number	
Email Address	
CSD Number	MAAA

PREPARED FOR:

INDEPENDENT DEVELOPMENT TRUST

Glenwood Office Park

Cnr Oberon & Sprite Streets

Faerie Glen

0043

CLOSING DATE AND TIME: 12 February 2026 @ 12:00 PM

Queries Email Address: insurance2025@idt.org.za

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	IDT/CSU/FAC/29/012026	CLOSING DATE	12 FEBRUARY 2026	CLOSING TIME:	12:00 PM
DESCRIPTION	PROCUREMENT OF A RISK MANAGEMENT AND SHORT-TERM INSURANCE INTERMEDIARY SERVICE PROVIDER TO PROVIDE THE FOLLOWING COVER(S) FOR INDEPENDENT DEVELOPMENT TRUST (IDT): BOARD OF DIRECTORS AND OFFICERS LIABILITY, AND OR EMPLOYERS PRACTICE LIABILITY AS WELL AS ALL MOVABLE/ IMMOVABLE ASSETS FOR A PERIOD OF THREE (3) YEARS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
GLENWOOD OFFICE PARK					
CNR OBERON & SPRITE STREETS					
FAERIE GLEN					
0043					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	PORTIA CAMPBELL-CHAUKE		CONTACT PERSON	MAHALI MOLOI VAN DE POL	
TELEPHONE NUMBER	N/A		TELEPHONE NUMBER	N/A	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	insurance2025@idt.org.za		E-MAIL ADDRESS	insurance2025@idt.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No <small>[IF YES ENCLOSURE PROOF]</small>		<small>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?</small>		<input type="checkbox"/> Yes <input type="checkbox"/> No <small>[IF YES, ANSWER THE QUESTIONNAIRE BELOW]</small>

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> NO

IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

TERMS OF REFERENCE

PROCUREMENT OF A RISK MANAGEMENT AND SHORT-TERM INSURANCE INTERMEDIARY SERVICE PROVIDER TO PROVIDE THE FOLLOWING COVER(S) FOR INDEPENDENT DEVELOPMENT TRUST (IDT): BOARD OF DIRECTORS AND OFFICERS LIABILITY, AND OR EMPLOYERS PRACTICE LIABILITY AS WELL AS ALL MOVABLE/ IMMOVABLE ASSETS:

LOCATION OF ASSETS: HEAD OFFICE AND REGIONS

TENDER NUMBER: IDT/CSU/FAC/29/01/2026

THE SCOPE OF WORK WILL BE AS FOLLOWS:

A) PLACEMENT OF IDT'S INSURANCE PORTFOLIO

Regarding the placement of IDT's insurance portfolio, the appointed Service Provider will be required to perform the following:

- Assess IDT's insurance requirements as reflected in the Tender Specification.
- Collect updated information from IDT with regard to the latest insurance statistics and submit this information to the Insurers Underwriters.
- Negotiate with the Insurance Underwriters on suitable insurance terms and premiums based on the quotations submitted by the Service Provider with the tender document submitted. The updated claims experience of IDT would also need to be taken into consideration in obtaining the final quotation from the Insurance Underwriters .
- Attend insurance pre-placement meeting/s with IDT to discuss the underwriting terms and premiums. It will be necessary for the Local Senior Manager (or equivalent) and Local Accounts Executive (or equivalent) to attend these meetings.
- Advise IDT and provide quotations on additional insurance covers that could be necessary for IDT to take out to ensure that IDT's risk is minimized.
- Place IDT's insurance portfolio with the Insurance Underwriters.
- **PLEASE NOTE THAT THE ANNEXURES A AND B SHOULD BE USED AS A GUIDANCE FOR THE BIDDER TO BE ABLE TO PROVIDE THEIRPRICING ACCORDINLY.**

B) UNDERWRITING ADMINISTRATION

Regarding the underwriting administration functions, the appointed Service Provider will be required to perform the following:

- Provide quotations on any additional insurance cover required by IDT and place the insurance cover with the Insurance Underwriters on IDT's instruction and provide IDT with written confirmation thereof together with details of the insurance cover placed.
- Meet with IDT Officials whenever required by either party to discuss and advise on insurance cover. Based on past experience approximately 6 meetings are expected to take place during the year to resolve certain insurance issues. However, it may be necessary to hold more/fewer meetings depending on circumstances. The Service Providers staff members required at these meetings will depend on the technicality of the issues to be discussed. Based on past experience the Local Senior Manager (or equivalent) and/or the Local Accounts Executive (or equivalent) are expected to attend these meetings.

C) CLAIMS ADMINISTRATION

Regarding the claims administration functions, the appointed Service Provider will be required to perform the following:

- Administer all IDT insurance claims which fall under the insurance policy.
- Meet with IDT Officials individually or in groups to discuss and provide advice on insurance claims.
- Submit half yearly updated reports on all IDT claims statistics.
- Meet with IDT Officials whenever required by either party to discuss and advise on insurance claims. However, it may be necessary to hold more/fewer meetings depending on circumstances. The Service Providers staff members required at these meetings will depend on the technicality of the issues to be discussed. Based on past experience the Local Senior Manager (or equivalent) and/or the Local Accounts Executive (or equivalent) are expected to attend these meetings.

D) RENEWAL/PLACEMENT OF IDT'S INSURANCE PORTFOLIO

Regarding the renewal of IDT's insurance portfolio prior to each financial year the appointed Service Provider will be required to perform the following:

- Assess IDT's insurance requirements as reflected in IDT's insurance policy.
- Collect updated information from IDT with regards to the latest insurance statistics and submit this information to the Insurance Underwriters.
- Negotiate with the Insurance Underwriters on suitable insurance terms and premiums based on IDT's existing insurance cover and the updated claim experience of IDT.

- Attend insurance pre-renewal meeting(s) with IDT to discuss the underwriting terms and premiums. It will be necessary for the Local Senior Manager (or equivalent) and Local Accounts Executive (or equivalent) to attend these meetings.
- Advise IDT and provide quotations on additional insurance cover that could be necessary for IDT to take out to ensure that IDT's risk is minimized.
- Renew IDT's insurance portfolio with the Insurance Underwriters and provide IDT with written confirmation thereof together with details of the insurance covers.

MOVABLE AND NON-MOVABLE ASSETS

Asset Category	Opening Cost 2025	Additions 2025	Disposal 2025	Closing cost	Net Carrying Amount 2025
Buildings	16,400,000.00	-	-	16,400,000.00	8,225,031.48
Canteen equipment	372,312.69	37,003.00	- 7,284.36	402,031.33	112,890.29
Furniture and fittings	12,972,452.20	949,635.58	- 1,313,505.73	12,608,582.05	2,977,111.51
IT Equipment	10,673,531.24	5,351,007.09	- 1,079,656.52	14,944,881.81	7,338,266.85
Land	4,000,000.00	-	-	4,000,000.00	4,000,000.00
Motor vehicles	226,519.07	-	-	226,519.07	136,314.56
Office equipment	4,712,886.07	14,743.00	- 283,801.88	4,443,827.20	322,875.90
Office equipment - Leased	1,556,773.06	-	- 51,345.05	1,505,428.01	- 0.00
Grand Total	50,914,474.33	6,352,388.67	-2,735,593.53	54,531,269.47	23,112,490.60

List of all current movable and non-movable assets as of September 2025

MANDATORY AND NON-MANDATORY REQUIREMENTS

NO	MANDATORY COMPLIANCE CRITERIA	ADMINISTRATIVE REQUIREMENTS
1	Proof of authority to sign the document must be submitted e.g. company resolution. (Only if company has more than one Director/member)	ID copies of Director/s

2	Bidders to provide the following: Proof of valid registration with the Financial Services Board (FSCA), Financial intermediaries association(FIA) and the Institute of Risk Management South Africa (IRMSA)	CIPC, Company registration document
3	A valid proof of R100 000 000 (100 million Rands) and above for the Professional Indemnity insurance	Proof of CSD Registration prior to award
4	No. copies of the original tender document to be submitted, no correctional fluids, erasable pen or a lead pencil will be used on any of the submitted forms. Only black ink must be used to complete documents. Any mistakes must be neatly crossed out and countersigned by all relevant parties.	Proof of address(e g: rates Bill or lease agreement)
5	Annual Financial Statements of the Service Provider for the past 3 years as well as Annual Financial Statements of the Main Proposed Underwriter for the past 3 years.	Tax pin/ TCS certificate
6	Bank Guarantee letter from Broker	Completed and Signed SBD Forms

FUNCTIONAL CRITERIA

Tenderers are required to score minimum points of 70 for Functionality stated in tender data.

Tenderers who fail to meet the required minimum number of points for functionality stated in the tender data will not be evaluated further for pricing and BBBEE.

Variables	Total Points	Criteria	Description Of Criteria	Points
<u>Functionality Points</u>	100			
Experience on similar short term insurance cover.	50	10 reference letters	The Service Provider must have reference letters (contactable) which includes previous experience in providing similar short-term insurance and technical support.	50
		6 -9 reference letters		30
		3-5 reference letters		15
		1-2 reference letters		5
		No reference letters		0

Variables	Total Points	Criteria	Description Of Criteria	Points
Qualification and experience of Senior Manager: (Attach CV)	15	10 years' experience and above with relevant qualification 6-9 years with qualification 3-5 with qualification 1-2 with qualification No Years of experience and qualification	A Local Senior Manager to provide technical and advisory support to the Local Accounts Executive; the Local Claims Technician and to IDT with AIISA (Associate of the Insurance Institute of South Africa) insurance qualification or equivalent plus 10 years' relevant experience.	15 12 8 4 0
Qualification and experience of Accounts Executive (Attach CV)	15	10 years and above with qualification 6-9 years with qualification 3-5 with qualification 1-2 with qualification No Years of experience and qualification	A Local Accounts Executive or equivalent to administer IDT's insurance portfolio; provide technical and administrative support to IDT (including obtaining quotations for new covers and the placing of the covers with the relevant insurer). Must have passed level 1 of the FAIS (Financial Advisory and Intermediary Services) regulatory exams and having a HCIL (Higher Certificate in Insurance) insurance qualification or equivalent plus 10 years' experience.	15 12 8 4 0
Methodology and processes to be followed when administering a claim	20	Risk assessment: Satisfactory procedure followed in dealing with claims and the end-to-end claims procedure. Risk assessment: Inadequate procedure followed in dealing with	A thorough and detailed methodology on how the Bidder is going to administer IDT's claims. Risk assessment: A need assessment conducted, and adequate information	20 5

Variables	Total Points	Criteria	Description Of Criteria	Points
		claims and the end-to-end claims procedure	gathered. A structured and feasible claims turn-around time.	
		No methodology submitted		0

Note: IDT reserves the right to conduct a risk assessment which is based on pricing, turnaround time for claims, as well as the methodology given by the service provider.

PRICING

Service Providers must provide a copy of the underwriter quotations as proof of the cost of the Underwriter Premium.

Kindly ensure that the Total Underwriting Premium Cost to IDT (including VAT) is in respect of the total insurance cover for IDT's insurance portfolio as detailed under the heading "Insurance Facts and Figures".

Once the tender has been awarded to the Service Provider, the Service Provider must place IDT's insurance portfolio with the quoted underwriters. The final insurance underwriting cost must be based on the original quoted price plus any appropriate premium adjustment.

An appropriate adjustment in the Premium and/or Inner Excesses/Deductibles will only be accepted if there has been an adverse increase in IDT's insurance claims within the 3-year period. However, if there was an adverse increase in insurance claims during this period, these increases must be averaged over the 3 years to determine an acceptable adjustment (IDT is to determine whether this adjustment is acceptable).

IDT'S MOVABLE ASSETS COVER: Kindly refer to movable, immovable asset register annexure and IDT package annexure A and B attached.

INDEMNITY COVER FEE	Pricing for all movable and immovable assets First year			Total annual amount including VAT
	Monthly insurance fee (Excluding VAT)	Annual insurance fee (excluding VAT)	Annual VAT amount	
Broker fee/ Intermediary fee	R	R	R	R
Administration fee	R	R	R	R

(if applicable)				
Underwriter's fee	R	R	R	R
TOTAL				R

INDEMNITY COVER FEE	Pricing for all movable and immovable assets Second year			Estimated Escalation %	Total annual amount including VAT
	Monthly insurance fee (Excluding VAT)	Annual insurance fee (excluding VAT)	Annual VAT amount		
Broker fee/ Intermediary fee	R	R	R		R
Administration fee (if applicable)	R	R	R		R
Underwriter's fee	R	R	R		R
TOTAL					R

INDEMNITY COVER FEE	Pricing for all movable and immovable assets Third year			Estimated Escalation %	Total annual amount including VAT
	Monthly insurance fee (Excluding VAT)	Annual insurance fee (excluding VAT)	Annual VAT amount		
Broker fee/ Intermediary fee	R	R	R		R
Administration fee (if applicable)	R	R	R		R
Underwriter's fee	R	R	R		R

TOTAL					R
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BRIEFING SESSION

There is no Compulsory Briefing Session.

All bids must be submitted at the IDT Head Office at the following physical address:

IDT Head Office (Pretoria)
 Glenwood Office Park
 Cnr Oberon & Sprite Streets
 Faerie Glen
 0043

GENERAL BID INFORMATION

Type: Request for Proposal (RFP)

RFP Closing Date and time: 12 February 2026 @12:00 PM

Validity Period: 90 days

Unsuccessful Bidders will not be notified.

If you do not receive any response from the IDT regarding this bid after 90 days from the closing date, please consider your bid unsuccessful.

NB: IDT RESERVES THE RIGHT TO WITHDRAW OR CANCEL THIS RFQ WITHOUT PRIOR NOTIFICATION TO THE RESPONDENTS.

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

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

2.2	Full Name	Identity Number	Name of State institution	Do you, or any person

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

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.

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

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

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

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

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

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

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 80/20 preference point system.
- b) 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	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black People	2	4
Total points for Price and SPECIFIC GOALS	100	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).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. 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

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20 or 90/10

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

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—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black People	2	4		

Source Documents to be submitted with the Bid or RFQ

- *CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- *Woman (Originally Certified ID Document)
- *Youth (Originally Certified ID Document)
- *People with Disability (Letter from the Dr. Confirming the Disability)

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 proprietor
- 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 contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

ANNEXURE A

Basic Excess Structure

Section	Excess	Minimum
Property Damage / Fire & Allied Perils		
Basic Excess		
Lightning -no SABS approved surge protection		
Power Surge		
Geysers (if SABS approved)		
Geysers (if not SABS approved)		
Unoccupied Buildings for the first 30 days : iro Theft & Malicious Damage Only (No cover for Material Damage & Theft after 30 days of unoccupancy)		
Fire as a direct result of Arson		
Vehicles Whilst parked		
Malicious Damage -(SASRIA related claims -should they deny liability)		
Accidental Damage		
Basic		
Accounts Receivable		
Basic		
Business Interruption		
As per Fire & Allied Perils above		
Office Contents		
Basic		
Lightning: no SABS-approved surge protection		
Theft		
Electronic Equipment		
Basic		
Laptops		
Increase in cost of working		
Lightning: no SABS-approved surge protection		
Business All Risks		
Basic		
Cellphones		

Tablets/iPads		
Laptops		
Locks and keys		
Theft		
Basic		
Theft of electrical cables		
Money		
Basic		
Loss or damage because of employee dishonesty		
Goods in Transit		
Basic		
Hijack and theft claims		

Glass		
Basic		
Fidelity Guarantee		
Basic		
GPA/Stated Benefits		
Medical		
Disability		
Motor		
Private Cars		
LDVs		
Hired Vehicles		
Commercial trucks		
Trailers, lawnmowers, implements etc.		
Windscreen (in respect of Private Cars and LDVs)		
Windscreen (in respect of Commercial/Trucks and all others)		
Theft/Hijack		
Motor third party damages		
Fire damages to vehicles not resulting from an accident		
The following additional excess applies in respect of all other cases:		
<i>Persons under 25 or over 75 years of age</i>		
<i>Persons who have held a license for less than 2 years</i>		
<i>Single vehicle accident excess if the accident occurred between 21:00 and 05:00 on all private type motor vehicles and LDVs</i>		
Public liability		
Basic		
All Other		
Professional Indemnity Liability		
Basic		
Directors & Officers Liability		
Basic		

ANNEXURE B

Fire & Allied Perils (Property Damage) Section

Section definitions

Definitions	
Standard buildings	Buildings constructed of brick, stone or concrete, or metal on metal framework and roofed with slate tiles, metal, concrete or asbestos unless otherwise stated in the schedules including landlord's fixtures and fittings therein and thereon walls (except dam walls) gates, posts and fences and contents therein.

Details of all insured premises

Situation of premises	All premises as stated in each section owned, hired, and/or leased to/by the insured for the purpose of the business, all situated within the territorial limits.
Target risk	Block B, Glenwood Office Park, 294 Sprite Ave, Faerie Glen, Pretoria, 0043
Other	Any premises owned, leased or hired by the insured and included in the declared value.

Policy loss limit

Policy loss limit (maximum liability for any one location/loss) unless specified	R200,000,000
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All single locations with a sum insured above R200 million must be declared and specified, otherwise maximum liability for any one location/loss is limited to R250 million.

Item 1: Fire and Allied Perils

Description	Sum insured/ Limit of indemnity
Buildings Combined	R119 945 000
Machinery Breakdown	R0
Additional Claims Preparation Costs	R1 000 000
Fixtures and Fittings	R0

Item 2: All non-standard construction buildings and contents

Non-Standard Construction	R0
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Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Reasonable Precautions	No	R0
Claims Preparation Costs	Yes	R100 000
Power Surge	No	R0
Disposal of Salvage	Yes	R200 000
Leakages of Oils and Chemicals	Yes	R100 000
Under Cover Parking	No	R0
Escalation (10%)	No	

Lock and Keys	Yes	R240 000
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Section premium including VAT	R
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Business Interruption Section

Risk Information

Premises	All premises permanently or temporarily owned, used or occupied by the insured
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Cover	Included	Sum insured/ Limit of Indemnity
Indemnity period		12 months
1. Gross Revenue	No	R0
2. Gross Rentals	No	R0
3. Loss of Production/ Water	Yes	R5 000 000
4. Increase in cost of working	Yes	R1 000 000
5. Additional increase in cost of working	No	R0
6. Fines and penalties	No	R0

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Suppliers/Sub-contractors (specified)	No	R0
Suppliers/Sub-contractors (unspecified)	No	R0
Prevention of access – extended cover	No	R0
Customers (specified)	No	R0
Public utilities and telecommunications – insured perils	No	R0
Public Utilities and telecommunications – extended cover	No	R0

Additional excess

Additional excess	N/A
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Section premium including VAT	R
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Office Contents Section

Risk information

Premises	All premises permanently or temporarily owned, used or occupied by the insured	
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Cover	Included	Sum insured/ Limit of Indemnity
Sub-section		
Office Contents	Yes	R 9 075 000
Office Fixtures & Fittings	No	R0
Office Equipment	No	R0
Theft or any attempt thereat (forcible entry or exit) at 25%	Yes	R2 268 750
Loss of rent at 25%	No	R0
Loss of documents	Yes	R500 000
Legal liability documents	Yes	R240 000
Increase in cost of working	No	R0

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Subsidence and landslip	No	R0
Capital Additions	No	R0
Riot and strike (other than RSA and Namibia)	No	R0
Locks and keys	Yes	R1 500
Reasonable precautions	No	R0
Claims preparation costs	No	R0

Section Premium including VAT

R

Electronic Equipment Section

Risk information

Premises	All premises permanently or temporarily owned, used or occupied by the insured
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Cover	Included	Sum insured/ Limit of Indemnity
Specified Hardware incl. networks and routers (excluding laptops & tablets)	Yes	R 12 100 000
Office Machinery	Yes	R3 411 472
PABX System	Yes	R3 630 000
Laptops and Portable Equipment (List Required)	Yes	R2 439 863
Worldwide Cover Laptops	Yes	R25 000

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
<i>Indemnity period: 6 months</i>		R0
Increased cost of working	Yes	R500 000
Failure of Electrical Supply	Yes	R100 000
Reinstatement of Data	Yes	R500 000
Incompatibility	Yes	R10 000
Prevention of access	No	R0
Telecommunications access lines	Yes	R100 000

Clauses, warranties and endorsements

Declaration warranty	Cover under this section requires the submission of the full listing of all insured items. Failure to declare such information may lead to the insurer, at its own discretion, imposing penalties of up to 50% of the claim or declining liability in its entirety.
IMEI/Serial number warranty	Cover under this section requires the submission of the IMEI and serial numbers in respect of all electronic devices (i.e. cell phones, tablets, iPad etc.) insured under this section upon request of the insurer.

Section Premium including VAT

R

Business All Risks Section

Risk information

Premises	All premises permanently or temporarily owned, used or occupied by the insured
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Cover	Included	Sum insured/ Limit of Indemnity
Unspecified items – (excluding laptops, cell phones and tablets)	No	R0
Property on hire consisting of personal computers, Laptops, Projectors, Video Equip Television Limit Per item (R35 000)	Yes	R500 000
Cellphones and Tablets	No	R0
Photographic Digital and GPS Equipment (R20 000 limit per item)	Yes	R100 000
Employees' Personnel effects	No	R0

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Replacement value condition	No	R0
Increased in cost of working	No	R0
Locks and keys	No	R0
Riot and strike (other than RSA and Namibia)	No	R0

Clauses, warranties and endorsements

Declaration warranty	Cover under this section requires the submission of the full listing of all insured items. Failure to declare such information may lead to the insurer, at its own discretion, imposing penalties of up to 50% of the claim or declining liability in its entirety
IMEI/Serial number warranty	Cover under this section requires the submission of the IMEI and serial numbers in respect of all electronic devices (i.e. cell phones, tablets, iPad etc.) insured under this section upon request of the insurer

Section Premium including VAT	R
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Theft Section

Risk Information

Premises	All premises permanently or temporarily owned, used or occupied by the insured	
Cover	Included	Sum insured/ Limit of Indemnity
First loss limit (subject to forcible and violent entry/exit)	No	R250 000

Section Extensions

Extension	Included	Sum insured/ Limit of Indemnity
Malicious damage to buildings	No	RO
Property in the open (subject to goods kept in a locked secured/fenced area and the claim is subject to forcible and violent entry/exit)	No	RO
Locks and keys	No	RO
Reasonable precautions	No	RO

Section Premium including VAT

R

Money Section

Risk information

Premises	All premises permanently or temporarily owned, used or occupied by the insured
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Cover	Included	Sum insured/ Limit of Indemnity
1. Major limit	No	R5 000
2. Minor limit	No	RO
In custody of any authorised employee, council member or principal of the insured whilst away from the insured's premises on a business trip anywhere in the world	No	RO
Whilst in the insured's premises outside the hours during which the business operations of the insured are conducted	No	RO
In respect of loss or damage to crossed money or postal orders	No	RO
In respect of loss of or damage to money from any Vending machine or parking meter	No	RO
Seasonal increase (during the last 3 days of the month)	No	RO

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Receptacles and clothing increase limit	No	RO
Locks and keys	No	RO
Reasonable precautions	No	RO
Personal accident (assault) per person		
<i>Capital amount</i>	No	RO
<i>Weekly amount</i>	No	RO
<i>Medical expenses</i>	No	RO
Claims preparation costs	No	RO

Section Premium including VAT	R
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Fidelity Guarantee Section

Risk information

Premises	All premises permanently or temporarily owned, used or occupied by the insured
Basis of cover	Blanket basis
Number of employees	All employees

Cover	Included	Sum insured/ Limit of Indemnity
Limit any one period	Yes	R1 000 000

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Retroactive cover	Yes	
Retroactive date: 1 July 2021		
Limit any one Period	No	RO
Reinstatement of insured amount	No	RO
Computer losses	No	RO
Claims preparation costs	No	RO

Section Premium including VAT	R
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Stated Benefits Section

Risk information

Premises	All premises permanently or temporarily owned, used, or occupied by the insured
Maximum any one life	R2,000,000
Conveyance accumulation limit	R10,000,000

Category 1: All Employees

Cover	Included	
Estimated Annual Wage Bill		R12 705 000
Benefits		
Death	Yes	2 x Annual Earnings
Permanent disability	Yes	%age of Death
Temporary total disablement	Yes	Weekly Amount up to 104 weeks

Category 2: Trustees

Count		12
Benefits		
Death	Yes	R1000 000
Permanent disability	Yes	%age of Death
Temporary total disablement	Yes	R1000 Weekly Amount up to 104 weeks

Section extensions

Extension	Included	Sum insured/ Limit of Indemnity
Medical expenses	Yes	R100 000.00
Accelerated death benefit	Yes	R50 000.00
Relocation	Yes	R75 000.00
Repatriation	Yes	R35 000.00
Mobility	Yes	R40 000.00
War risks	Yes	R0.00
24 hours	Yes	
Business hours limitation	Yes	

Section Premium including VAT	R
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Motor Fleet (Specified) Section

Risk information

Basis of Cover	Specified Vehicles (List Attached)
Cover	Comprehensive
Category D	
Description	Hire Vehicles on Official Business
Limit if Indemnity	R400 000
Estimated Number of Days	4 500
Category B	
Description	Hire Vehicles on Official Business
Limit of Indemnity	R300 000
Estimated Number of Days	200
Subjectives	Declaration of Monthly hired vehicles

Specified Motor

Make and Model	Toyota Starlet
Limit of Indemnity	R260 323
Registration Number	TBA
Engine Number	TBA
Chassis/VIN number	TBA

Motor Third Party Liability

Extension	Included	Limit of Indemnity
Motor third party liability	Yes	R2 500 000

Section extensions

Extensions	Included	Limit of Liability
Fire extinguishing costs	Yes	R15 000
Wreckage removal	Yes	R15 000
Medical expenses (per occupant)	Yes	R10 000
Loss of keys	Yes	R15 000
Theft or attempted theft of radios/sound equipment	Yes	R5 000
Theft or attempted theft of telephones	Yes	R5 000

Section Premium including VAT	R
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Public Liability Section

Risk information

Estimated annual wage bill	
Basis of cover	
Limit of liability	Annual Agreement Limit
Retroactive date	

Cover	Included	Sum insured/ Limit of Indemnity
General Liability	Yes	R75 000 000
Tenants Liability	No	R0
Spread of fire	No	R0

Section extensions and additional contingencies

Extension	Included	Sum insured/ Limit of Indemnity
Wrongful Arrest and Defamation	yes	R2 250 000
Defamation	No	R 0
Products/defective Workmanship	No	R 0
Legal Defense Costs	Yes	R2 250 000
Spread of Fire	No	R0

Clauses, warranties and endorsements

Spread of fire	<p>1. The cover provided by this section in respect of liability arising out of the spread of the fire in fire control areas is subject to:</p> <ul style="list-style-type: none"> • The insured complying with the conditions of the Forestry Act 122 of 1984 (or as amended) and any other act or regulation relating to the spread of fire to surrounding properties • The limit of indemnity and deductibles in respect of the spread of fire are the amounts shown in the specification above <p>2. The insured shall maintain a 100 metre strip free of all vegetation, trees or any refuse around any municipal refuse or other dumping area and failure to do so will render the insured responsible for the 50% (minimum R50,000) of each and every claim resulting from the spread of fire from the dumps.</p>
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Section Premium including VAT	R
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Employers Liability Section

Risk information

Basis of cover	Claims made
Limit of liability	Annual Accumulation limit
Retroactive date	

Cover	Included	Sum insured/ Limit of Indemnity
Employers' liability	Yes	R 2 000 000

Section extensions and additional contingencies

Extension	Included	Sum insured/ Limit of Indemnity
Extended reporting	No	R0

Section Premium including VAT	R
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Directors & Officers Liability Section

Risk information

Basis of cover	Claims made
Limit of liability	Annual Aggregate limit including legal defense costs
Retroactive date	

Cover	Included	Sum insured/ Limit of Indemnity
Side A: Directors & Officers	Yes	R50 000 000
Side B: Company Reimbursement	Yes	R50 000 000
Side C: Company Securities	Nil	

Section extensions and additional contingencies

Extension	Included	Sum insured/ Limit of Indemnity
Extended reporting	No	R0.00

Section Premium including VAT	R
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SASRIA Schedule and Index of Cover

Policy Sections	Section Applicable	Annual Premium
Fire	Yes	R
Business Interruption	Yes	R
Money	No	R 0.00
Goods in Transit	No	R 0.00
Revenue	No	R
Money	No	R 0.00
Goods in Transit	No	R 0.00
Light Commercial Vehicles (below 3500kg)	Yes	R
Heavy Commercial Vehicles (above 3500kg)	No	R 0.00
Buses	No	R 0.00
Mobile Plant	No	R 0.00
Total Amount payable including VAT		R

Notes:

All sums insured and premiums are inclusive of 15% VAT.

Various as per underlying policies market value

