



Request for Proposals:
APPOINTMENT OF THE SERVICE PROVIDER
FOR INSURANCE BROKERING SERVICES
FOR THE COEGA DEVELOPMENT
CORPORATION (PTY) LTD

Contract No
CDC/46/25

Closing Date: 09 FEBRUARY 2026

Closing Time: 12h00

Name of Bidder:

Classification: Public

DOCUMENT INFORMATION SHEET

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INSURANCE BROKERING SERVICES FOR THE COEGA
DEVELOPMENT CORPORATION (PTY) LTD*

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Prepared for : *Prospective Bidders*

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DOCUMENT CONTROL SHEET

The purpose of this form is to ensure that documents are reviewed and approved prior to issue. The form is to be bound into the front of all documents released by the CDC.

PROJECT NAME : APPOINTMENT OF THE SERVICE PROVIDER FOR INSURANCE
BROKERING SERVICES FOR THE COEGA DEVELOPMENT
CORPORATION (PTY) LTD

DOCUMENT TITLE : Request for proposals

DOCUMENT No. : CDC-CD-RFP-001-25

SIGNING OF THE ORIGINAL DOCUMENT

We, the undersigned, accept this document as a stable work product to be placed under formal change control as described by the Change Control Procedure document.

ORIGINAL	Prepared by	Reviewed by	Approved by
Date:	Name: Nosikhumbuzo Peter	Name: Garth Elliot	Name: Rodger Hill
	Signature:	Signature:	Signature:

Distribution:	Potential Bidders
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REVISION CHART

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Date	Signature:	Signature:	Signature:

REVISION 2	Name: Nosikhumbuzo Peter	Name: Garth Elliot	Name: Rodger Hill
Date: 26 November 2025	Signature:	Signature:	Signature:
Digitally Signed by: Rodger Hill Chief Financial Officer 7947a63b-6e5a-4387-b18c-28a1859d7e09 IP Address: 10.0.99.131 Date: 2025/11/26 2:29:04 PM	 Garth Elliot 10aa4dce-4e00-41f1-9bb7-344ab1512ae8 2025/11/26 2:18:00 PM		Digitally Signed by: Nosikhumbuzo Peter Procurement Manager 86ae0ff8-3f51-46a5-9a9c-7b2f8246ec81 IP Address: 10.0.57.147 Date: 2025/11/26 2:12:13 PM

REVISION 3	Name:	Name:	Name:
Date:	Signature:	Signature:	Signature:

REQUEST FOR PROPOSALS
APPOINTMENT OF THE SERVICE PROVIDERS FOR INSURANCE BROKERING
SERVICES FOR THE
COEGA DEVELOPMENT CORPORATION (PTY) LTD
Contract No. CDC/46/25

The Coega Development Corporation (CDC) is headquartered in the City of Gqeberha, Nelson Mandela Bay Municipality, South Africa, with a strategic operational footprint in South Africa and beyond the borders in the African continent. The CDC's vision is to be the leading catalyst for the championing of socio-economic development. This it seeks to achieve through the development and operation of the 9 003 hectare Coega Special Economic Zone (SEZ), a transshipment hub and a leading investment destination in Africa, providing highly skilled competence and capacity for the execution of quality complex infrastructure and related projects throughout South Africa and selected markets on the African continent, and advisory on the development of industrialization and logistics zones. The CDC's advanced capabilities are successful enablers in economic zone development and management, real assets management, infrastructure planning and development for National, Provincial, Local Government Departments and State-owned Entities, technology integration while realising related socio-economic impact areas such as skills and SMME development. The foundational culture of the CDC's approach, backed by core values, is innovation and continuous improvement.

INVITATION TO TENDER

The Coega Development Corporation (CDC) is inviting capable and competent Financial Service Providers who are registered with Financial Sector Conduct Authority(FSCA), with proven experience and track record to submit their proposal for the provision of Insurance Brokering Services for a five (5) y (60 months) period

SCOPE OF WORK OF SERVICES

The CDC requires the following services, all to be provided for a fixed monthly fee:

- a) Providing professional advice on short term insurable risks.
- b) Providing professional risk control and risk management.
- c) Lead the CDC through a process that will enable it to make well informed insurance decisions.
- d) Conducting and maintaining an environmental analysis to establish CDC insurance needs.
- e) Investigating and maintaining the various product options that would meet CDC insurance needs.
- f) Conducting and maintaining cost-benefit analyses to determine the most appropriate approach.

- g) Ongoing placement of the insurance with the selected insurer (s).
- h) Providing confirmation of insurance cover.
- i) Securing and facilitating the annual and/or cyclical renewal of insurance covers.
- j) Securing and facilitating the procurement of new or additional insurance covers where necessary.
- k) Managing and administering insurance claims.
- l) Assisting the CDC to comply with applicable legislation, regulations and applying best practice in handling insurance issues.

The following table summarises the various key CDC policies at present:

Policy type	Description
Assets	Buildings (R6,5bn building portfolio), office contents, plant and machinery, electronic equipment (R100m cover)
Business interruption	Loss of rental and other income (R420m cover)
Liability	R100m cover
Directors and officers liability	R50m cover
Commercial crime	R10m cover
Motor fleet	R30m insured value
Specialised plant and equipment	R10m cover
Boutique hotel	Specialised covers
Cyber	R50m
SASRIA	

2.1) Reporting

The following monthly reports should be provided:

- a) Reconciliation of all claims data and contributions paid pertaining to the risk schemes.
- b) Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.
- c) A reconciliation of claims received and registered, claims submitted to the insurance company, payments made on claims, including verifying the correctness of the payment calculation by the insurance company repudiated claims; and measures taken by the service provider through a third-party supplier to address repudiated claims, including progress made on any litigation process in connection with a repudiated claim.

- d) A performance report recording any failures to achieve service levels, the nature and date thereof, the causes of the failures and a summary of steps taken to resolve the failures and avoid them in the future.
- e) Updating CDC on legal developments within the short-term insurance industry and informing CDC on insurance product developments, and the risk mitigation developments in the South African market.
- f) Ongoing evaluation of uninsured risks and possible options for addressing them.
- g) Ongoing analysis of loss statistics to identify trends to assist CDC in future loss prevention and more effective management of risk.

2.2 Meetings

- a) The Service Provider will be required to review the CDC short-term insurance portfolio with CDC Procurement and Finance departments in a formalised pre-set meeting on a quarterly basis.
- b) The Service Provider will be required to report on the overall progress of the Services and discuss service execution issues i.e., problems, risks, administrative issues etc. at a Service Relationship Review on an annual basis.

2.3 Advice to CDC

- a) The Service Provider must provide specialist advice on the short-term insurance portfolio in the event CDC requests such advice and must assist CDC with the interpretation of insurance policy documents and matters incidental thereto, including the interpretation of insurance rules and regulations.

2.4 Risk management

- a) The Service Provider must undertake a continuous risk management process from an insurance perspective for CDC, entailing the identification of risks, the assessment thereof and the recommendation of risk mitigation insurance measures.

2.5 Administrative Arrangements

- a) Payment of insurance premium to be made on a monthly basis.

CONDITIONS OF TENDER

- a) Respondents must comply with the CDC's Procurement Policy & Procedures.
- b) The following legislation shall apply:
 - (i) Public Finance Management Act (PFMA) (Act No. 1 of 1999);
 - (ii) Preferential Procurement Policy Framework Act (PPPFA), 2000;
 - (iii) The Preferential Procurement Regulations 2022.
 - (iv) National Treasury Regulations.
 - (v) Occupational Health and Safety Act and Regulations Act (Act No. 85 of 1993);
 - (vi) Compensation for Occupational injuries and disease Act (Act No.130 of 1993);
 - (vii) Disaster Management Act (Act No. 57 of 2002);
 - (viii) Board-Based Black Economic Empowerment (BBBEE) Act (Act No. 53 of 2003), as amended by Act No. 46 of 2013);
 - (ix) Competition Act (Act No. 89 of 1998);
 - (x) Protection of Personal Information Act (Act No. 4 of 2013); and any other applicable legislation.
 - (xi) Short-term insurance Act 53 of 1998
 - (xii) Financial Advisory and Intermediary Services (FAIS) Act, 2002 (Act No. 37 of 2002).
- b) Bidders must confirm their company registration with Companies and Intellectual Property Commission (CIPC) (formerly CIPRO) as CDC will not award any bid to any business that appears on the CIPC List of de-registered businesses
- c) As per financial sector code, generic entities as well as Qualifying Small Enterprises (QSE) with less than 51% black shareholding are to submit a valid SANAS Accredited B-BBEE Verification Certificate. All Exempted Micro Enterprises (EME) and Qualifying Small Enterprises (QSE) with more than 51% black shareholding are to submit a sworn affidavit stamped and signed by the Commissioner of Oaths as per the DTI B-BBEE template
- d) Proof of registration with Treasury's Centralized Supplier Database (CSD) or provide a Treasury CSD registration number e.g. MAAA0...
- e) Rates tendered will be subject to negotiation, not exceeding the applicable industry rates as prescribed by the tariff of fees or remuneration guidelines issued by the relevant professional service organization or regulatory body.
- f) The CDC will only award the tender to a bidder who is tax compliant. The tax compliance status of the bidders will be verified through CSD and South African Revenue Services (SARS) website. Prospective bidders must ensure that they are Tax Compliant throughout the validity period of the bid in review.
- g) Bidders must be Value Added Tax (VAT) registered and bids must be submitted VAT inclusive. Non-VAT vendors who submit bids for contracts that would, if successful, take their annual turnover above the threshold of R 1 million are obliged to include VAT in the prices quoted and must therefore immediately upon award of the contract register with the SARS as VAT vendors. The award of contract would be conditional pending the successful Bidder submitting proof of registration as a VAT vendor with SARS.

- h) The CDC will not award more than five (5) active projects to one bidder, unless one project has reached 80% completion stage and beyond. Capacity assessment may be conducted in an event that the recommended Bidder is the only responsive service provider and has already been awarded five contracts.
- i) Bidders must complete and sign the POPI Act Consent Form.
- j) Public servants are prohibited from doing any form of business with organs of state, whether in their own capacity as individuals or through companies in which they are directors. Verification will be done, and Bidders will be disqualified should they be found to be in contravention with the Regulations.
- k) It is incumbent upon and the responsibility of the Prospective Bidders to submit their full and correct contact details when they download the Request for Proposal (RFP) Document to enable any communication that the CDC might need to issue to all the Prospective Bidders during the bidding process to be realized. The CDC will not be accountable for any such omission or failure by the Prospective Bidders.
- l) The appointment will be for 5 years.
- m) Joint Venture & Consortiums will not be accepted due to the nature of services that require a single entity appointment.
- n) Bidders will be evaluated on functionality and are expected to meet the minimum of 65% threshold in order to be evaluated further. The evaluation criteria for assessing functionality and weight of each criterion are provided under Section 5.2 Table 4A & 4B of the RFP document.
- o) The 80/20 preference point system, will be applicable for allocating points for price and points for specific goals. The following scores will be applicable:

Price	- 80
Specific Goals	- 20
- p) The bids will be evaluated as follows:
 - (i) Stage 1: Responsiveness Assessment,
 - (ii) Stage 2: Functionality Assessment,
 - (iii) Stage 3: Quantitative Assessment, and
 - (iv) Stage 4: Qualitative Assessment.
- q) Late Submissions will not be accepted.
- r) The tender validity period shall be twelve **(12) weeks** from the RFP closing date.
- s) Any misrepresentation of information will lead to immediate disqualification of the Bidder's Submission. It is imperative that the duly authorized person conducts quality control on all the documentation to be submitted to the CDC as part of this RFP and signs the submission as a correct and sound documentation that the CDC could put its reliance on.

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Downloading of Documents

Bid documents will be available for download from the CDC Website (www.coega.co.za), and E-Tender Portal from **28 November 2025 10:00 am, at no cost**. No hard copies of the RFP Document will be made available by CDC to any Bidder. Potential bidders must provide their email addresses in the system before downloading the documentation for correspondence purposes. Potential bidders must therefore ensure that the email addresses are correct. It is the bidder's responsibility to ensure the document is downloaded correctly and submitted as per the original document sequence as CDC will not be responsible for any inconsistencies on the tender document which may lead to the disqualification of the bidder.

Briefing Meeting

A compulsory briefing Meeting will be held on **Friday, 05 December 2025 at 11:00** at the CDC Head Office, Corner Alcyon Road & Zibuko Street, Zone 1, Coega SEZ, Gqeberha.

Bid Communication

Queries relating to this RFP may be addressed to Ms. Zine Mtanda, Unit Head: Supply Chain Management strictly via e-mail: tenderscdc4625@coega.co.za between the period of **28 November 2025 to 02 February 2026**. No new queries received after **02 February 2026** will be considered.

Closing of bids date and time

The closing date and time for the receipt of completed bids is **Monday, 09 February 2026 at 12:00** at the **CDC Head Office, Corner Alcyon Road & Zibuko Street, Zone 1, Coega SEZ, Gqeberha**. Bids must be deposited in a Tender box on the Ground Floor at document control office.

One original completed bid document shall be placed in a sealed envelope clearly marked: **"CDC/46/25: RFP – APPOINTMENT OF THE SERVICE PROVIDER FOR INSURANCE BROKERING SERVICES FOR THE COEGA DEVELOPMENT CORPORATION (PTY) LTD."**

Bids will not be opened in public, and no late submission will be considered. Should a bidder prefer to use a Courier, the onus is on the bidder to make sure that the documents are received by the CDC on time. Failure to provide mandatory information required in this bid will result in the submissions being deemed null and void and shall be considered non-responsive.

Telegraphic, telexed, facsimiled or e-mailed submissions will not be accepted.

No telephonic or any other form of communication relating to this Bid with any other CDC member of the staff, CDC Agent, client, or any other role players will be permitted other than Ms Zine Mtanda, Unit Head: Supply Chain Management. All enquiries regarding this bid must be in writing only and addressed to:

The CDC reserves the right not to accept the lowest proposal in part or in whole or any proposal.

TABLE OF CONTENTS

1	INTRODUCTION	1
2	SCOPE OF INSURANCE BROKERING SERVICES REQUIRED.....	2
3	BIDS EVALUATION PROCESS.....	4
3.1	Stage 1: Responsiveness Assessment	4
3.2	Stage 2: Functionality Assessment	Error! Bookmark not defined.
3.3	Stage 3: Quantitative Assessment	13
3.4	Stage 4: Qualitative Assessment	13
4	TERMS & CONDITIONS	13
5	DISQUALIFICATION	14

1 INTRODUCTION

The Coega Development Corporation (CDC) is a public entity in terms of the Public Finance Management Act (PFMA), based in the Nelson Mandela Bay Municipality with operations throughout South Africa. Established in 1999, the corporation is mandated to develop and operate the asgazetted 9 003ha Coega Special Economic Zone (SEZ). The Coega SEZ was gazetted by the Minister, Dr. Rob Davies, (Government Gazette No. 40883 on 2 June 2017) in terms of section 39(2) of the SEZ Act No. 16 of 2014 ("SEZ Act"), replacing the Government Gazette No. 21803 of 1 December 2000) made in terms of the Manufacturing Development Act No. 187 of 1993.

The CDC aims to create employment opportunities, provide training and development as well as SMME support and development. This is meant to reduce unemployment and to eradicate poverty in the Eastern Cape, with a focus on the Nelson Mandela Bay Metro. Therefore, the CDC's vision is to be the leading catalyst for the championing of socio-economic development. Its mission is to provide competitive investment locations, facilitate holistic infrastructure and value-adding commercial business solutions that effectively enable socio-economic development in the Eastern Cape and the rest of South Africa.

In the 26 years since its establishment in 1999, the CDC has become South Africa's most successful SEZ and one of the biggest drivers of job creation and development of the Eastern Cape's economy. It is purpose-designed following the cluster model, which strategically positions related and synergistic industries and their supply chains near one another to maximise efficiency and minimize turnaround times.

Apart from the Coega SEZ, the CDC established other diversified business operations (non-SEZ operations) geared towards generating alternative sources of revenue to ensure the financial sustainability of the organisation. The non-SEZ operations include the following:

- Coega Human Capital Solutions, which provides recruitment and selection, training and development, staff development services for investors in the SEZ and social facilitation of infrastructure programmes.
- Coega Corporate Travel Services, which provides seamless and cost-effective travel management solutions as well as business and leisure travel-related solutions (including accommodation and car hire) through Coega Corporate Travel (CCT). CCT holds an "International Air Travel Transport Association (IATA) accreditation, a seal of approval that is recognised worldwide.
- Coega Business Solutions, which provides a fully scalable suite of integrated management consultancy and turnkey solutions, such as ICT services and accommodation and conferencing at the Coega Vulindlela Accommodation and Conference Centre (VACC); and Project Management Services, which provides engineering and infrastructure project management skills honed during the construction of the Coega SEZ. These skills have been retained to enable the CDC to contribute towards the socio-economic development of the

country. to this end, the CDC acts as an Implementing Agent (IA) for a range of public and private sector clients, providing infrastructure development and facilities management services throughout South Africa. CDC is also assisting other companies/ agencies in the country with the establishment of SEZs under the new SEZ Act (Act No. 16 of 2014), which includes the newly established Tshwane Automotive Special Economic Zone in the Gauteng Province, City of Tshwane.

- Coega Africa Programme: In the current financial year, these services have been extended to the rest of the African continent, especially the Eastern Corridor. Through its Africa Trade and Investment Solutions Strategy, the CDC is championing the country's renewed push for business exchanges between South Africa and the rest of the continent.

2 SCOPE OF INSURANCE BROKERING SERVICES REQUIRED

The CDC requires the following services:

- a. Providing professional advice on short term insurable risks.
- b. Providing professional risk control and risk management.
- c. Lead the CDC through a process that will enable it to make well informed insurance decisions.
- d. Conducting and maintaining an environmental analysis to establish CDC insurance needs.
- e. Investigating and maintaining the various product options that would meet CDC insurance needs.
- f. Conducting and maintaining cost-benefit analyses to determine the most appropriate approach.
- g. Ongoing placement of the insurance with the selected insurer (s).
- h. Providing confirmation of insurance cover.
- i. Securing and facilitating the annual and/or cyclical renewal of insurance covers.
- j. Securing and facilitating the procurement of new or additional insurance covers where necessary.
- k. Managing and administering insurance claims.
- l. Assisting the CDC to comply with applicable legislation, regulations and applying best practice in handling insurance issues.

The following table summarises the various key CDC policies at present:

Policy type	Description
Assets	Buildings (R6,5bn building portfolio), office contents, plant and machinery, electronic equipment (R100m cover)
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Liability	R100m cover
Directors and officers liability	R50m cover
Commercial crime	R10m cover
Motor fleet	R30m insured value
Specialised plant and equipment	R10m cover
Boutique hotel	Specialised covers
Cyber	R50m
SASRIA	

Reporting

The following monthly reports should be provided:

- Reconciliation of all claims data and contributions paid pertaining to the risk schemes.
- Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.
- A reconciliation of claims received and registered, claims submitted to the insurance company, payments made on claims, including verifying the correctness of the payment calculation by the insurance company repudiated claims; and measures taken by the service provider through a third-party supplier to address repudiated claims, including progress made on any litigation process in connection with a repudiated claim.
- A performance report recording any failures to achieve service levels, the nature and date thereof, the causes of the failures and a summary of steps taken to resolve the failures and avoid them in the future.
- Updating CDC on legal developments within the short-term insurance industry and informing CDC on insurance product developments, and the risk mitigation developments in the South African market.
- Ongoing evaluation of uninsured risks and possible options for addressing them.
- Ongoing analysis of loss statistics to identify trends to assist CDC in future loss prevention and more effective management of risk.

Meetings

- a) The Service Provider will be required to review the CDC short-term insurance portfolio with CDC Procurement and Finance departments in a formalised pre-set meeting on a quarterly basis.
- b) The Service Provider will be required to report on the overall progress of the Services and discuss service execution issues i.e., problems, risks, administrative issues etc. at a Service Relationship Review on an annual basis.

Advice to CDC

- a) The Service Provider must provide financial advice on the short-term insurance portfolio in the event CDC requests such advice and must assist CDC with the interpretation of insurance policy documents and matters incidental thereto, including the interpretation of insurance rules and regulations.

Risk management

- a) The Service Provider must undertake a continuous risk management process from an insurance perspective for CDC, entailing the identification of risks, the assessment thereof and the recommendation of risk mitigation insurance measures.

Administrative Arrangements

- a) Payment of insurance premium to be made on a monthly basis.

3 BIDS EVALUATION PROCESS

3.1 Stage 1: Responsiveness Assessment

(a) Mandatory Requirements

The following criteria will be used in assessing the responsiveness of bids.

Table 1: *Mandatory Requirements to be submitted*

NO.	DESCRIPTION
1.	Fully completed and Signed SBD 1 FORM: Invitations to Bid.
2.	Fully completed and Signed SBD 4 FORM: Bidder's Disclosure.
3.	Attendance Register at the mandatory briefing meeting to be completed in the name of the bidding entity. One person cannot represent more than one company. Failure to attend the Compulsory Briefing Meeting <u>will</u> lead to the Bidder's elimination and the submission <u>will</u> not be evaluated further.

NO.	DESCRIPTION
4.	Fully completed and Signed Certificate of Authority of Signatory to be signed by the authorised person in the Bidder's Organisation. Proof of Authority to sign may be submitted in a form of company resolution
5.	Fully completed and signed Pricing Schedule and Form of Offer filled in clear legible permanent ink.
6.	Bidder must be registered with the Financial Sector Conduct Authority (FSCA). Provide a valid certificate evidencing registration with the Financial Sector Conduct Authority (FSCA) as a commercial short term insurance broker as well as a certificate of accreditation with the South African Insurance Association (SAIA). Brokers need to register with the FSCA to act as a Financial Services Provider (FSP), with the FSP being Accredited.

NB: Failure to complete all mandatory information will result in submissions being deemed null and void and shall be considered *"non-responsive"*.

Table 2: Additional requirements

1.	<i>Completed and signed form SBD 6.1 preference points claim in terms of the Preference procurement Regulation 2022</i>
2.	As per amended financial code, generic entities as well as Qualifying Small Enterprises with less than 51% black shareholding are to submit a valid SANAS Accredited B-BBEE Verification Certificate. All Exempted Micro Enterprises and Qualifying Small Enterprises with more than 51% black shareholding are to submit a sworn affidavit stamped and signed by the Commissioner of Oaths as per the DTI B-BBEE template.
3.	The Service Provider should provide CDC with an organogram of the staff and or Company Profile
4.	Proof of access to key personnel with relevant experience to execute the works
5.	Completed and signed POPIA Consent Form.

3.2 Stage 2: Functionality Assessment

Bids will be subjected to a Functionality assessment.

Clause 3.2.1: - FUNCTIONALITY ASSESSMENT SCORE

Table 3A: Functionality Criteria and Weighting

#	Functionality criteria	Maximum points	Requirements
1	<i>Competence and capabilities of the insurance broker</i>	30	<p>Demonstrate competence and capability in providing the full range of services as well as the full range of policy types described under section 2 scope of services in a way that allows CDC to understand and assess the competencies and capabilities of the bidder. This should include case studies of services provided to the bidder's clients recently.</p> <p>(i) Environmental analysis, cost-benefit analysis and ongoing placement of insurance covers for the various product lines:</p> <ul style="list-style-type: none"> a. Assets - Buildings (R6,5bn building portfolio), office contents, plant and machinery, electronic equipment (R100m cover) b. Business interruption - Loss of rental and other income (R420m cover) c. Liability - R100m cover d. Directors and officers liability - R50m cover e. Commercial crime - R10m cover f. Motor fleet - R30m insured value g. Specialised plant and equipment - R10m cover h. Cyber insurance – R50m cover i. Boutique hotel - Specialised covers <p>(ii) Monthly reporting processes and provision of advisory services</p>
2	<i>Experience in short-term brokering services for corporations</i>	30	Demonstrate experience in procuring, managing, and administering all corporate short-term insurance covers set out in section 2 Scope of Services above.

			<p>Bidders must provide at least three (3) reference letters with contactable references from its own clients confirming provision of all insurance covers as set out in section 2 scope of services above and with insurable asset values concomitant with the values set out in section 2 scope of services above, to whom the bidder is providing or has provided broker services for short-term insurance.</p> <p>The bidder must provide written references from its own clients, and not that of its sub-contractors</p>
3	<i>Demonstrate experience and international affiliations in short-term brokering services</i>	20	<p>Nominated professional representative of the bidder must provide CV including proof of professional registration with the Insurance Institute of South Africa as a fellow with relevant experience in broker services for short-term insurance.</p> <p>Bidder to provide documentary evidence of an affiliation, association or membership of a reputable international insurance brokerage.</p>
4	<i>Locally Based Service Provider</i>	20	<p>Bidders(s) are required to submit proof of office establishment, such as lease agreement, title deed or municipal statement(s), which will be verified accordingly. The municipal statement must not be older than three (3) months from date of submission. All of the proofs submitted in respect of the afore-mentioned must be in the Bidders(s) name. Failure to submit to submit sufficient proof of occupancy will render the bid non-responsive.</p> <p>Please note: CSD, CIPC registration documents, Letterheads, Search engines, statements etc. will not be considered as proof of office space.</p>

Table 3B: Functionality Criteria – Prompts for scoring

	Functionality criteria	points to be allocated per criterion				
		0%	Poor (25%)	Satisfactory (50%)	Good (75%)	Excellent (100%)
1.	<i>Competence and capabilities of the insurance broker</i>	Failed to provide information	The demonstrated competencies and capabilities do not (<25%) address the list of services required and the range of insurance covers required as specified in section 2 scope of services above.	The demonstrated competencies and capabilities do not (<50%) address the list of services required and the range of insurance covers required as specified in section 2 scope of services above.	The demonstrated competencies and capabilities do address (>75%) the list of services required and the range of insurance covers required as specified in section	The demonstrated competencies and capabilities completely (100%) addresses the list of services required and the range of insurance covers required as specified

	Functionality criteria	points to be allocated per criterion				
			There is a substantial lack of information.	There is a lack of information.	2 scope of services above. Adequate information is provided and case studies submitted clearly demonstrate relevant experience and competencies.	in section 2 scope of services above. Comprehensive information is provided and case studies submitted clearly demonstrate relevant experience and competencies for similar SEZ entities.
2.	<i>Experience in short-term brokering services for corporations</i>	Failed to provide information	One (1) qualifying reference letter with contactable references from its own clients confirming provision of all insurance covers as set out in section 2 scope of services above and with insurable asset values concomitant with the values set out in the section 2 scope of services above, to	Two (2) qualifying reference letters with contactable references from its own clients confirming provision of all insurance covers as set out in section 2 scope of services above and with insurable asset values concomitant with the values set out in the section 2 scope of	Three (3) qualifying reference letters with contactable references from its own clients confirming provision of all insurance covers as set out in section 2 scope of services above and with insurable asset values concomitant	More than three (3) qualifying reference letters with contactable references from its own clients confirming provision of all insurance covers as set out in section 2 scope of services above and with insurable asset

	Functionality criteria	points to be allocated per criterion				
			whom the bidder is providing or has provided broker services for short-term insurance in the last ten (10) years.	services above, to whom the bidder is providing or has provided broker services for short-term insurance in the last ten (10) years and documentary proof of providing asset insurance cover concomitant with the values set out in the section 2 scope of services above to such clients.	with the values set out in the section 2 scope of services above, to whom the bidder is providing or has provided broker services for short-term insurance in the last five (5) years and documentary proof of providing asset insurance cover concomitant with the values set out in the section 2 scope of services above to such clients.	values concomitant with the values set out in the section 2 scope of services above, to whom the bidder is providing or has provided broker services for short-term insurance in the last five (5) years and documentary proof of providing asset insurance cover concomitant with the values set out in the section 2 scope of services above to such clients, of which at least 1 letter is from a SA SEZ operator.
3.	<i>Demonstrate experience and international</i>	Failed to provide information	Less than 5 years' experience in procuring, managing, and	5 to 9 years' experience in procuring, managing, and administering short	10 to 14 years' experience in procuring,	More than 14 years' experience in procuring, managing,

	Functionality criteria	points to be allocated per criterion				
	<i>affiliations in short-term brokering services</i>		administering short term insurance covers by the designated representative. Proof of professional registration with the Insurance Institute of South Africa	term insurance covers by the designated representative. Proof of proof of professional registration with the Insurance Institute of South Africa Proof of an affiliation, association or membership of an international insurance brokerage.	managing, and administering short term insurance by the designated representative. Proof of proof of professional registration with the Insurance Institute of South Africa as a fellow. Proof of an affiliation, association or membership of a reputable international insurance brokerage.	and administering short term insurance covers by the designated representative. Proof of proof of professional registration with the Insurance Institute of South Africa as a fellow. Proof of an affiliation, association or membership of a reputable international insurance brokerage.
4.	<i>Locally Based Service Provider</i>	Failed to provide information	Situated outside the Eastern Cape Province	Situated within the Eastern Cape Province	Situated within the Sarah Bartman Local Municipality	Situated in the Nelson Mandela Bay Metropolitan Municipal Area.

A threshold of 65% has been set and all bidders that achieve less than this threshold will not be further evaluated.

3.2.2 Stage 3: Quantitative Assessment

Bids that pass the Functionality Stage will be further evaluated on Price and Specific Goals. The Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2022 shall apply.

3.3.3 Stage 4: Qualitative Assessment

The Qualitative Assessment will be conducted on all the bids that pass Functionality by obtaining minimum score of 65%. The main thrust of this assessment would not be to second-guess the bidder but to address the question around potential capacity and commercial risks. Bidders who have not contracted with CDC in the past will be required to submit performance reports from previous clients.

4 TERMS & CONDITIONS

- (a) All submissions must be received by the CDC no later than **12:00 on 26 January 2025**. Respondents must submit their RFP documents before the closing date and time and no late submissions will be considered.
- (b) All submissions and subsequent information received will become the property of the CDC and will not be returned.
- (c) Failure to complete all mandatory information will result in submissions being deemed null and void and shall be considered *“non-responsive”*.
- (d) Telegraphic, telexed, tippexed, faxed or e-mailed submissions will not be accepted.
- (e) The CDC reserves the right not to accept any submission. If the CDC does not accept any submission, it will declare this Request for Proposals process to be closed, or to proceed on a completely different basis, or not to proceed with the services.
- (f) Submission of a bid and its subsequent receipt by the CDC does not represent a commitment on the part of the CDC to proceed further with any Respondent or any contract.
- (g) The Respondent shall treat as confidential all documentation, drawings, reports, etc. which are provided pursuant to this RFP.
- (h) The CDC will consider the proposed key personnel in the tenderer's bid as the assigned resources for any project/s to be awarded. Any changes to these proposed personnel are subject to CDC's approval prior to being changed by the bidder.
- (i) No costs incurred by the Respondents in the preparation of their submission will be reimbursed.
- (j) All Respondents will be advised as soon as the successful Bidder has been approved pertaining to this tender.
- (k) The tender validity period for all bids shall be 12 weeks.

5 DISQUALIFICATION

Bidders will be disqualified immediately during the tendering stage or during the tender evaluation and adjudication stage or after the contract has been awarded if they are found to have conducted or committed any of the following:

- (a) Bidders, bidder's representatives, associates, or shareholders that sought to influence adjudication process of this tender, or outcomes of the adjudication process, directly or indirectly.
- (b) Bidder that failed to follow or observe the lines of communication that are prescribed in the Advert.
- (c) Collusion among bidders.
- (d) Misrepresentation of information.
- (e) Any Bidder or its principals or both who have engaged in corrupt and fraudulent practices, not only with the CDC but anywhere else.
- (f) Bidders who have pending liquidation, in receivership, bankrupt/insolvent (actually and commercially).
- (g) Bidder or discipline partner appearing on National Treasury blacklist, and

6 GENERAL CONDITIONS OF CONTRACT

Any award made to a bidder under this bid is conditional, amongst others, upon –

6.1 The bidder accepting the terms and conditions contained in the General Conditions of Contract, as the minimum terms and conditions upon which CDC is prepared to enter a contract with the successful bidder.

6.2. SERVICES AGREEMENT

- 6.2.1. Upon award, CDC and the successful bidder will conclude an agreement regulating the specific terms and conditions applicable to the services being procured by CDC, in the format of the draft Services Agreement included in this tender pack.
- 6.2.2. CDC reserves the right to vary the proposed terms and conditions of the draft Services Agreement during negotiations.
- 6.2.3. Bidders are requested to-
 - a. Comment on the terms and conditions set out in the draft Services Agreement and where necessary, propose required changes to such terms and conditions: and
 - b. Each comment and/or amendment must be explained.
- 6.2.4 CDC reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable to CDC or pose a risk to the

organisation. For this reason, it is not required that the draft Services Agreement be signed on submission of the bidder's proposal.

6.3. INSURANCE

The successful bidder will be required, on or before the effective date of the Services Agreement and for the duration of the Agreement, to have and maintain in force adequate insurance cover consistent with acceptable and prudent business practices and acceptable to CDC, which shall include, without limitation, professional indemnity insurance cover.

6.4. SPECIAL CONDITIONS OF THIS BID

CDC reserves the right:

- 6.4.1. Not to award or cancel this bid at any time and shall not be bound to accept the lowest or any bid.
- 6.4.2. To negotiate with the preferred service provider as and when required throughout the lifecycle of the contract.
- 6.4.4 To cancel and/or terminate the bid process at any stage.
- 6.4.5 To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the bid.
- 6.4.6 Addendum/ erratum's to be issued by CDC or any changes to be made on the bid document.
- 6.4.7 To disqualify a bidder whose bid contains a misrepresentation which is materially incorrect or misleading.

6.7. BIDDER'S OWN TERMS AND CONDITIONS OR BID QUALIFICATIONS

This document contains the terms and conditions of this bid and bidders must not qualify the specifications or come up with their own terms and conditions. Bids that are qualified will be disqualified.

6.8. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

The bidder should note that the terms of its bid will be incorporated in the proposed contract by reference and that CDC relies upon the bidder's bid as a material representation in making an award to a successful bidder and in concluding a Services Agreement with the bidder. It follows therefore that misrepresentations in a bid may give rise to service termination and a claim by CDC against the bidder notwithstanding the conclusion of the Services Agreement between CDC and the bidder for the provision of the services in question. In the event of a conflict between the bidder's proposal and the Services Agreement concluded between the parties, the Services Agreement will prevail.

6.9. PREPARATION COSTS

The bidder will bear all its costs in preparing, submitting, and presenting any response or tender to this bid and all other costs incurred by it throughout the bid process. Furthermore, no statement in this bid will be construed as placing CDC, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidder in the preparation of their response to this bid.

6.10. INDEMNITY

If a bidder breaches the conditions of this bid and, as a result of that breach, CDC incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies CDC from any harmless and all such costs which CDC may incur and for any damages or losses CDC may suffer.

6.11. PRECEDENCE

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

6.13. GOVERNING LAW

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African High Courts in any dispute of any kind that may arise out of or in connection with the subject matter of this bid, the bid itself and all processes associated with the bid.

6.14. RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors, and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid and in particular the provisions of paragraph 6.13 above.

6.15. CONFIDENTIALITY

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's bid proposal(s) will be disclosed by any bidder or other person not officially involved with CDC's examination and evaluation of a bid.

6.16. INTELLECTUAL PROPERTY RIGHTS

Subject to pre-existing intellectual property rights of the bidder and/or any third party, all intellectual property rights to literary works created in the course of executing the services contemplated in this RFP shall vest exclusively in CDC. By bidding, bidders irrevocably agree to transfer, make over and assign to CDC such relevant intellectual property rights.

6.17. OWNERSHIP OF DELIVERABLES AND INTELLECTUAL PROPERTY

- a) All the submissions and subsequent information received by the CDC as part of the bidding process shall become the property of the CDC and will not be returned to any Bidder.
- b) Any deliverables (documents, drawings, etc.) prepared by the successful Bidder and submitted to the CDC during the execution of the contract arising from this RFP shall become the property of the CDC, as its Intellectual Property including its Copy Rights.
- c) The deliverables from the successful Bidder to the CDC during the execution of the contract would be both in the printed and in electronic format, and no PDF will be accepted. The CDC will advise the successful Bidder of the specific format in which the electronic deliverables should be submitted.

7 RETURNABLE BIDDING DOCUMENTS/FORMS

ANNEXURE A: INVITATION TO BID

SBD 1

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (COEGA DEVELOPMENT CORPORATION (CDC))					
BID NUMBER:	CDC/46/25	CLOSING DATE:	09 February 2026	CLOSING TIME:	12H00
DESCRIPTION	APPOINTMENT OF THE SERVICE PROVIDER FOR INSURANCE BROKERING SERVICES FOR THE COEGA DEVELOPMENT CORPORATION (PTY) LTD				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Reception Document Control, Coega Business Centre					
Cyr Alcyon Road and Zuko Street					
Zone 1, Coega SEZ					
Gqeberha					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Zine Mtanda		CONTACT PERSON	Zine Mtanda	
TELEPHONE NUMBER	N/A		TELEPHONE NUMBER	N/A	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	tenderscdc4625@coega.co.za		E-MAIL ADDRESS	tenderscdc4625@coega.co.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
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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?

☐ YES ☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

☐ YES ☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

☐ YES ☐ NO

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

PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2022 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p> <p>1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> <p>2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."</p>

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

7.2 SBD 4 FORM, BIDDERS DISCLOSURE

SBD 4

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.

Full Name	Identity Number	Name of State institution

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

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

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or 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;

² 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.

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

7.3 SBD 6.1 FORM, PREFERENCE POINT CLAIM FORM

SBD 6.1

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

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

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

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

1.2 To be completed by the organ of state

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

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).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

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

Where

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

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:

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

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 (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Level 1	20	
Level 2	18	
Level 3	14	
Level 4	12	
Level 5	8	
Level 6	6	
Level 7	4	
Level 8	2	
Non-Complaints Contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2. Name of company/firm.....

4.3. Company registration number:

4.4. 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]

4.5. 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 Bidder 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, 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>	
SURNAME AND NAME:
DATE:
ADDRESS:

7.4 PRICING SCHEDULE AND FORM OF OFFER

APPOINTMENT OF THE SERVICE PROVIDER FOR INSURANCE BROKERINGSERVICES FOR THE COEGA DEVELOPMENT CORPORATION (PTY) LTD

NB: The successful bidder will be required to invoice CDC monthly by dividing the annual fee by 12 for each year of the 5-year appointment period. The fee is an overall fixed fee per annum for the provision of all the services referred to in section 2 above, is not variable in any way and is not itemised or hourly rate based.

BIDDERS NAME: _____

- (1) Bidders must note the detailed scope of services as per the Main RFP document and should provide costing accordingly.
- (2) Bidders are required to propose a flat Broker fee per annum. Note that failure to propose the fee will render the entire bid as NON-RESPONSIVE.
- (3) Fees MUST be all inclusive. This means, all direct and indirect related costs must be included
- (4) All prices will be fixed for the duration of the contract.
- (5) All costs may be subject to negotiation prior to signing of the Contract
- (6) Bidders are not allowed to change the format of this pricing template; any changes by the bidders shall result in their bid being non-responsive.

	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL FEES FOR 5 YEARS
Fees for Insurance Brokering Services as set out in the Scope of Insurance Brokering Services required						
TOTAL FEES PER YEAR EXCL VAT						
TOTAL FEES PER YEAR INCLUDING VAT						

7.5

FORM OF OFFER

CDC/46/25

SERVICE PROVIDER FOR INSURANCE BROKERING SERVICES FOR THE COEGA DEVELOPMENT CORPORATION (PTY) LTD

We/I _____ in my/our capacity as _____
(name of representative) (state position)

and duly authorized representative for the _____

(Name of the Company or Entity)

offer the total price of R _____ (Incl. of VAT)

(Amount in Words)

for the CDC/46/25

Name of Authorised Person: _____ Signature: _____

Date: _____

Witness:

Name: _____ Signature: _____

Date: _____

7.6 POPI ACT CONSENT FORM

PROTECTION OF PERSONAL INFORMATION: CONSENT

The introduction of The Protection of Personal Information Act (POPIA) ensures the regulation of personal information through its entire life cycle of collection, transfer, storing and deletion.

As part of its business activities, the Coega Development Corporation (CDC) obtains and requires access to personal data from a wide range of internal and external parties, including without limitation bidders who respond to requests for proposals that are published by the CDC from time to time. The CDC confirms that it shall process the information disclosed by Bidders for the purpose of evaluating and subsequently awarding/appointing a successful Bidder.

In order to comply with procurement principles, set out in Section 217 of the Constitution and national procurement legislative prescripts, the names of all entities that submitted a bid, the tendered price thereof and the subsequent award will be made public.

The CDC hereby states that it does not and will never modify, amend, or alter any personal information submitted to it by a Bidder. Unless directed to do so by an order of court, the CDC does not disclose or permit the disclosure of any personal information to any Third Party without the prior written consent of the owner of the information.

Similarly, Bidders will from time-to-time access and will be seized with information of a personal nature pertaining to the CDC. Some of the information may, because of legislative compliances be available in the public domain, whilst some is uniquely provided to bidders in pursuit of procurement or other business-related activities. In this regard, the CDC requires that Bidders which receive or have access to its personal information, process any such information in a manner compliant with the requirements of the POPIA.

AGREEMENT

1. The CDC and the Bidder (the Parties) agree and undertake that upon obtaining and having access to personal information relating to either of them, they shall always ensure that:
 - a) They process the information only for the express purpose for which it was obtained.
 - b) Information is provided only to designated and authorized personnel who require the personal information to carry out the Parties' respective obligations in terms of the Procurement processes.
 - c) They will introduce, and implement all reasonable measures ensure the protection of all personal information from unauthorized access and/or use.
 - d) They have taken appropriate measures to safeguard the security, integrity, and authenticity of all personal information in its possession or under its control.
 - e) The Parties agree that if personal information will be processed for any other purpose other than the one for which the accessing of the information was intended, explicit written consent will be obtained prior to the execution of such reason.
 - f) The Parties shall carry out regular assessments to identify all reasonably foreseeable internal and external risks to the interception of personal information in its possession or under its control and shall implement and maintain appropriate controls in mitigation of such risks.
2. The Parties agree that they will promptly return or destroy any personal data in their possession or control which belongs to the other Party once it no longer serves the purpose for which it was collected, subject

to any legal retention requirements. The information will be destroyed in such a manner that it cannot be reconstructed to its original form, linking it to any individual or organisation.

3. Bidder's Obligations:

- g) The Bidder is required to notify the Information Officer of CDC, in writing as soon as possible after it becomes aware of or suspects any loss, unauthorized access or unlawful use of any of the CDC's personal information.
- h) The Bidder shall, at its own cost, promptly and without delay take all necessary steps to mitigate the extent of the loss or compromise of personal data.
- i) The Bidder shall be required to provide the CDC with details of the persons affected by the compromise and the nature and extent of the compromise, including details of the identity (if known) of the unauthorized person who may have accessed or acquired the personal data.
- j) The Bidder undertakes to co-operate with any investigation relating to security breach which is carried out by or on behalf of CDC.

On behalf of the Bidder:

..... Signature Date
..... Position Name of the Bidder

On behalf of the Client:

..... Signature Date
..... Position Name of Client Representative

SWORN AFFIDAVIT – B-BBEE QUALIFYING SMALL ENTERPRISE - GENERAL

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a Member / Director / Owner (**Select one**) of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Vat Number (If applicable)	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of “Black People”	<p>As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 “Black People” is a generic term which means Africans, Coloureds and Indians –</p> <ul style="list-style-type: none"> (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- <ul style="list-style-type: none"> i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;”
Definition of “Black Designated Groups”	<p>“Black Designated Groups means:</p> <ul style="list-style-type: none"> (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;”

1. I hereby declare under Oath that:

- ✓ The Enterprise is _____% Black Owned using the flow-through principle as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ The Enterprise is _____% Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ The Enterprise is _____% Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- ✓ Black Designated Group Owned % Breakdown as per the definition stated above:
 - ✓ Black Youth % = _____%
 - ✓ Black Disabled % = _____%
 - ✓ Black Unemployed % = _____%
 - ✓ Black People living in Rural areas % = _____%
 - ✓ Black Military Veterans % = _____%
- ✓ Based on the Audited Financial Statements/ Financial Statements and other information available on the latest financial year-end of _____(DD/MM/YYYY), the annual Total Revenue was between R10,000,000.00 (Ten Million Rands) and R50,000,000.00 (Fifty Million Rands),
- ✓ Please confirm on the table below the B-BBEE level contributor, **by ticking the applicable box.**

100% Black Owned	Level One (135% B-BBEE procurement recognition level)	
At Least 51% black owned	Level Two (125% B-BBEE procurement recognition level)	

2. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the owners of the enterprise which I represent in this matter.
3. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: _____

Date: _____

Commissioner of Oaths
Signature & stamp
Date: