Road Traffic Management Corporation

APPOINTMENT OF A SERVICE PROVIDER FOR PROVISION OF SHORT-TERM INSURANCE SERVICES TO THE RTMC FOR A PERIOD OF THREE (03) YEARS WITH AN OPTION TO EXTEND FOR TWO (02) YEARS

RTMC BID NO: 05/2026/27

SECTION: 1

CONDITIONS AND UNDERTAKINGS BY BIDDER

IN RESPECT OF THIS BID

CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID

1. Proprietary Information

1.1 Road Traffic Management Corporation (RTMC) considers this bid and all related information, either written or verbal, provided to the Bidder to be proprietary of RTMC. It shall be kept confidential by the Bidder and its officers, employees, agents, and representatives. The Bidder shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of RTMC.

2. Enquiries

2.1 All communication and attempts to solicit information of any kind relative to this bid should be channelled to the email below, however the cut-off date will be on the **22 September 2026**.

Name	**RTMC**
Email Address	**Bidadmin@rtmc.co.za**

2.2 All the documentation submitted in response to this bid must be in English preferred as one of the official languages.

2.3 The RTMC reserves the right to provide clarifications to bidders only on matters relating to this bid. Such clarifications, where issued, will be shared in a manner that promotes fairness, transparency, and equal treatment of all bidders. Bidders remain responsible for submitting responsive bids based on the information contained in the bid documents and any official clarifications issued by the RTMC.

3. Validity Period

3.1 Responses to this bid received from bidders will be valid for a period of **120 days** counted from the closing date of the bid.

4. Supplier Performance Management

4.1 The RTMC views Supplier Performance Management as critical in ensuring value-for-money acquisition and good supplier relations between the RTMC and all its suppliers.

4.2 Upon receipt of written notification of an award, the successful Bidder shall be required to conclude SBD 7.2 and the Service Level Agreement (SLA) with the RTMC, which will form an integral part of the agreement. The SLA will be a tool to measure, monitor, and assess the Bidder's performance level and ensure effective service delivery, quality, and value-add to RTMC business.

4.3 Should the successful Bidder fail to sign the SBD 7.2 and the SLA when called upon to do so, the RTMC may, without prejudice to any other rights it may have -

4.3.1 cancel the contract that may have been entered into between the successful Bidder and the RTMC, and the successful Bidder shall pay to the RTMC any additional expenses incurred by the RTMC having either:

4.3.1.1 to accept any less favourable Bid or,

4.3.1.2 if new Bids have to be invited, the additional expenditure incurred by the invitation of fresh Bids and/ or by the subsequent acceptance of any less favourable Bidder.

5. Instructions on submission of Bids

5.1 Bids should be submitted as follows:

5.1.1 **Technical envelopes**

i. Two (2) copies for technical responses/functional evaluation (one original and one copy)
ii. PDF soft copy in a memory stick of the technical responses/functional (to be enclosed in the envelope that contains the original document)

5.1.2 **Financial envelopes**

i. The pricing schedule should be submitted separately. Two (2) copies (one original and one copy)
ii. PDF soft copy of the pricing schedule on a memory stick (to be enclosed in the envelope that contains the original document)

5.2 All envelopes to be sealed and endorsed, **RTMC BID 05/2026/27: Appointment of a service provider for provision of insurance services to the RTMC for a period of three (03) years with an option to extend for two (02) years.**

5.3 The sealed envelope must be placed in the bid box at the Main Reception area of the **RTMC Centurion Gate Business Park, Block D, 146 Akkerboom Street, Zwartkop Centurion, no later than 11:00 am on 30 September 2026.**

5.4 **Compulsory Briefing Session: Online/Virtual**

The online/Virtual compulsory briefing session details are as follows:

5.4.1 Bidders must register for a compulsory briefing session by submitting the necessary information to bidadmin@rtmc.co.za by **15 September 2026 at 14:00 pm** to be eligible to participate in the compulsory briefing and the bid process.

5.4.2 The following information is required to register for a briefing session:

- Company Name
- CSD Registration number
- Name and Surname of the Representative

5.4.3 Upon registration, a link will be shared with the bidders to enable them to participate in the stated virtual meeting.

5.4.4 Bidders will be required to log in using their company name thirty (30) minutes before the start of the briefing session to allow for virtual registration. For example, if the session starts at 10:00, bidders can log in at 09:30, and the session will begin promptly at 10:00 am.

5.4.5 After the briefing session, a signed briefing certificate will be emailed to all the bidders who were part of the online/virtual briefing session.

NB: The mentioned briefing certificate must be attached to the bid documents upon submission on the closing date of the bid. (Failing which will invalidate the bid)

5.5 **Compulsory Briefing Session: Online/Virtual**

5.5.1 The online/Virtual compulsory briefing session will be held on **17 September 2026** at **10:00 am.**

5.6 The envelope must also endorse the Bidder's company name, closing date, and return address.

5.7 All bids submitted must be signed by a person or persons duly authorized thereto.

5.8 Suppose a courier service company is being used to deliver the bid document. In that case, the bid description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered into the bid box. The RTMC will not be held responsible for any delays where documents are not placed in the bid box before the closing date and time.

5.9 Bid received by email, facsimile, or similar medium will not be considered.

5.10 Where a bid document is not placed in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **Late bids will not be considered**.

5.11 Amended bids may be sent in an envelope marked **“Amendment to Bid”** and should be placed in the bid box before the closing time.

5.12 Bidders should check the number of the pages to satisfy themselves that all are included and not duplicated. RTMC will accept no liability regarding anything arising from the fact that pages are missing or duplicated.

6. Undertakings by the Bidder

6.1 The Bidder accepts that all costs incurred in preparation, presentation, and any demonstration in relation to this bid shall be for the Bidder's account.

6.2 The Bidder hereby offers to render all or any of the services described in the attached documents to the RTMC on the terms and conditions and in accordance with the specifications stipulated in this bid documents (and which shall be taken as part of and incorporated into, this proposal at the prices inserted therein).

6.3 The Bidder shall prepare for a possible presentation should RTMC require such, and the Bidder shall be notified by 4 (four) days before the presentation date. Such presentation may include a demonstration of products or services as called for by the RTMC in relation to this bid.

6.4 The successful Bidder hereby accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.

6.5 Note that should the bid be accepted, and the Bidder be unwilling or unable to commence the services on the commencement date and / or during the execution of the contract due to circumstances that are within its control, the RTMC shall be entitled, without prejudice to any other rights it may have –

6.5.1 to terminate the contract or
6.5.2 claim specific performance from the successful bidder and
6.5.3 claim damages from the successful bidder.

6.6 The Bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price (s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price (s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accepts that any mistakes regarding price (s) and calculations will be at his/her risk.

6.7 The RTMC reserves the right not to accept the lowest bid or any bid in part or whole. RTMC typically awards the contract to the Bidder, who proves to be fully capable of handling the contract and whose bid is technically acceptable and financially advantageous to RTMC.

6.8 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.

6.9 The RTMC reserves the right to conduct a site visit at the premises of the offices or any client sites if required.

6.10 The RTMC reserves a right to amend any bid conditions, validity period, or specifications or extend the closing date of the bid before the initially stated closing date. Bidders will be advised in writing of such amendments in good time.

6.11 The RTMC reserves the right to request all relevant information, agreements, and other documents to verify information supplied in the bid response. The bidder hereby consents to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

6.12 RTMC reserves the right to verify the authenticity of all the submitted documentation.

6.13 The RTMC acknowledges and agrees that all data and Personal Information provided by the Bidder to the RTMC, or to which the RTMC may be exposed, shall constitute Personal Information.

6.14 The RTMC hereby undertakes–

6.14.1 In favour of the Bidder that it shall at all times strictly comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) and any other legislation related to the protection of Personal Information.

6.14.2 To use its best efforts to keep Personal Information confidential and shall not disclose any Personal Information to any other person except as required by law, save to the extent set out in this bid;

6.14.3 At the RTMC's option, return or destroy any Personal Information once it is no longer required to perform its obligations under this bid or any directly related purpose and

6.14.4 not process Personal Information for any purpose other than to perform its obligations under this bid.

6.15 The RTMC reserves the right to reject a proposal for the award of a contract if the recommended bidder has committed a corrupt or fraudulent act in competing for the particular contract; or

6.15.1 Cancel a contract awarded to a supplier of goods or services –

i. if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract; or

ii. if any official or other role player committed any corrupt or fraudulent act during the bidding process or the execution of that contract that benefited that supplier.

6.16 The RTMC reserves the right to disregard the bid of any bidder if that bidder, or any of its directors –

(i) have abused the institution's supply chain management system

(ii) have committed fraud or any other improper conduct in relation to such system; or

(iii) have failed to perform on any previous contract.

6.17 RTMC will inform the relevant treasury of any action taken in terms of paragraph (7.10).

6.18 **The RTMC will never request any compensation in whatever form; from any supplier to be awarded a contract. Suppliers are hereby advised not to fall for these scammers**.

7. RTMC's Rights

7.1 The RTMC reserves the right not to accept the lowest bid or any bid in part or whole. RTMC typically awards the contract to the Bidder, who proves to be fully capable of handling the contract and whose bid is technically acceptable and financially advantageous to RTMC.

7.2 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.

7.3 The RTMC reserves the right to conduct a site visit at the premises of the offices or any client sites if required.

7.4 The RTMC reserves a right to amend any bid conditions, validity period, or specifications or extend the closing date of the bid before the initially stated closing date. Bidders will be advised in writing of such amendments in good time.

7.5 The RTMC reserves the right to request all relevant information, agreements, and other documents to verify information supplied in the bid response. The bidder hereby consents to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

7.6 RTMC reserves the right to verify authenticity of all the submitted documentation.

7.7 The RTMC acknowledges and agrees that all data and Personal Information provided by the Bidder to the RTMC, or to which the RTMC may be exposed, shall constitute Personal Information.

7.8 The RTMC hereby undertakes–

9.1.1 In favour of the Bidder that it shall at all times strictly comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) and any other legislation related to the protection of Personal Information.

9.1.2 To use its best efforts to keep Personal Information confidential and shall not disclose any Personal Information to any other person except as required by law, save to the extent set out in this bid;

9.1.3 At the RTMC's option, return or destroy any Personal Information once it is no longer required to perform its obligations under this bid or any directly related purpose and

9.1.4 not process Personal Information for any purpose other than to perform its obligations under this bid.

7.9 The RTMC reserves the right to reject a proposal for the award of a contract if the recommended bidder has committed a corrupt or fraudulent act in competing for the particular contract; or

7.9.1 Cancel a contract awarded to a supplier of goods or services –

i. if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract; or

ii. if any official or other role player committed any corrupt or fraudulent act during the bidding process or the execution of that contract that benefited that supplier.

7.10 The RTMC reserves the right to disregard the bid of any bidder if that bidder, or any of its directors –

(i) have abused the institution’s supply chain management system

(ii) have committed fraud or any other improper conduct in relation to such system; or

(iii) have failed to perform on any previous contract.

7.11 RTMC will inform the relevant treasury of any action taken in terms of paragraph (7.10).

7.12 **The RTMC will never request any compensation in whatever form; from any supplier to be awarded a contract. Suppliers are hereby advised not to fall for these scammers**.

8. SPECIAL INSTRUCTIONS TO BIDDERS

8.1 Bidders shall provide complete and accurate answers to the questions posed in this document.

8.2 Bidders must substantiate their response to all questions, including details on how their proposal/solution will address specific functional/technical requirements. All documents, as indicated, must be supplied as part of the bid response.

8.3 RTMC reserves the right to include any additional related items on the contract that are not part of the bid document.

8.4 The RTMC will not be held responsible for any costs incurred in preparing and submitting bid documents.

8.5 RTMC reserves the right to verify the information bidders provide; any misrepresentation will lead to the Bidder's disqualification.

8.6 The bidder is expected to provide a dedicated Service or Account Manager for the duration of the tender /project.

8.7 To prevent the abuse of SCM system, RTMC will under no circumstances allow or promote bid rigging (or collusion bidding) from any bidder. For instance, bidders who submit bid documents on their own, and enter into Joint Venture Agreement or any other Agreement with another company using the same company, irrespective of either declared on SBD 4 or not. Both bidders will be disqualified should such be identified.

8.8 It is the responsibility of the bidder to formally inform or communicate with the RTMC on any administrative changes or amendments after their appointment into the panel which may have negative impact on execution of the contract, where necessary, the RTMC reserves the right to conduct due diligence.

SECTION: 2

SPECIFICATION DETAILS AND FUNCTIONALITY REQUIREMENTS

SECTION 2: TECHNICAL REQUIREMENTS/ SPECIFICATION

1. PURPOSE

1.1 The purpose of this bid is to appoint a suitably licensed insurance service provider capable of providing comprehensive short-term insurance services to the RTMC for a period of three (03) years with an option to extend for two (02) years. The successful bidder may either be:

- a licensed short-term insurer authorised in terms of the Insurance Act; or
- a licensed Financial Services Provider acting as an insurance intermediary or broker with authority to arrange the required insurance cover through licensed insurers.

2. BACKGROUND

2.1 The RTMC intends to utilise a self-funded deductible arrangement for the motor fleet. Under this model:

- RTMC will fund motor losses up to an agreed threshold per claim through its own self-insurance fund.
- The insurer will provide catastrophic and excess loss cover above the agreed threshold.
- The threshold shall be agreed during contract negotiations and reviewed annually.
- The insurer shall administer claims, monitor the fund, and provide annual actuarial or claims experience recommendations regarding the threshold and premium

2.2 The Corporation intends to acquire incorporated insurance covering both motor and non-motor assets on the basis that the motor cover terms should serve as self-insurance and standard comprehensive business all-risk insurance for the assets of the Corporation.

2.3 The premiums should be renegotiated on an annual basis. Annual premium reviews shall be based on objective underwriting considerations, including claims experience;

- changes in insured values;
- additions and disposals;
- loss ratios;
- market conditions;
- underwriting capacity;
- inflation

2.4 It is against this background that the RTMC would like to appoint suitably qualified insurance service providers to render insurance services to the Road Traffic Management

Corporation (RTMC) for a period of three (03) years with an option to extend for two (02) years.

3. SCOPE OF WORK AND DETAILED SPECIFICATIONS

3.1 RISK AREAS TO BE COVERED

ACCIDENTAL AND VIOLENT DAMAGE (PROTESTS) INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, FIRE, LOSS OR THEFT.	
DESCRIPTION	**VALUE**
1. ELECTRONIC EQUIPMENT/COMPUTERS	
1.1. Scanners, printers, servers & switches	Asset register to be provided with values.
1.2. Computer equipment	
1.3. Laptops, notepads, iPads	
1.4. Other related electronic equipment	

NB: Kindly note that assets are movable between regions (Take note of the location on the asset register)

ACCIDENTAL AND VIOLENT DAMAGE (PROTESTS) INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, FIRE, LOSS OR THEFT.	
DESCRIPTION	**VALUE**
2. Generators Driving Simulators	Asset register to be provided with values.

ACCIDENTAL AND VIOLENT DAMAGE (PROTESTS) INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, FIRE, LOSS OR THEFT.	
DESCRIPTION	**VALUE**
3. PROPERTY DAMAGES	Asset register to be provided with values
- Traffic College Land & building - Park homes - Leasehold Improvements - Security Fencing - Borehole Pump station - Sewerage pump station	

COMPREHENSIVE COVER (SELF INSURANCE)	
DESCRIPTION	**VALUE**
4. FLEET BREAKDOWN	Asset register to be provided with values.
4.1. Motor vehicle	
4.2. Buses	
4.3. Trucks	
4.4. Weighbridges and testing stations	
4.5. Trailers	
4.6. Tractors	
4.7. Seat belt Simulators	
4.8. Motor bikes	
4.9. Evidentiary breath alcohol test vehicles (65 / 35 seaters converted)	

ACCIDENTAL AND VIOLENT DAMAGE (PROTESTS) INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, FIRE, LOSS OR THEFT.	
DESCRIPTION	**VALUE**
5. OFFICE EQUIPMENT AND FURNITURE FITTINGS	Asset register to be provided with values.
5.1. Office furniture	
5.2. Office equipment	

THEFT OR LOSS, ACCIDENTAL DAMAGE AND OTHER RELATED RISKS	
DESCRIPTION	**VALUE**
6. Armoury – Glocks and Rifles	Asset register to be provided with values.

ALL BUSINESS RISK	
DESCRIPTION	**VALUE**
7. COMMUNICATION DEVICES	Asset register to be provided with values.
7.1. Cellular phones (iPhones or Samsungs)	
7.2. iPads and tablets	
7.3. Push-to-talks (PTTs) / Two-Way Radios	

THEFT OR LOSS, ACCIDENTAL DAMAGE AND OTHER RELATED RISKS	
DESCRIPTION	**VALUE**
8. Goods in transit	
9. All other related risks	

ALL RISK COVER	
DESCRIPTION	**VALUE**
10. BUSINESS INTERRUPTION	
10.1. Increase in cost of working Public Utilities	

ALL RISK COVER	
DESCRIPTION	**VALUE**
11. PUBLIC LIABILITY – Indemnity for R50 000 000.	On an ad hoc basis as and when required
11.1. RTMC Law Enforcement Operations in general (any official issued/authorised to handle and use the firearm)	
11.2. RTMC Road Safety Operations in general	
11.3. RTMC Traffic Training and Colleges related activities in general	
11.4. Board Members, Board Committees and Prescribed Officers (Directors and Officers' liability)	
11.5. 3 Years Post Tenure of Office Liability Cover: Board Members, Board Committees and Prescribed Officers	
11.6. Legal defence	
11.7. Employers' liability including employee to employee	
11.8. Employers' liability including employees against harm resulting from external parties	
11.9. Cover on rented vehicles and equipment (not owned by the Corporation)	

The following normal insurance services will be required on an ad-hoc basis:

12. AD-HOC SERVICES	
DESCRIPTION	**VALUE**
12.1Risk surveys	On an ad-hoc basis as and when required
12.2 Valuation advice	
12.3 Risk engineering	
12.4 Loss prevention	
12.5 Catastrophe modelling where applicable	
12.6 Annual insurance programme review	
12.7 Policy wording review	
12.8 Advice regarding uninsured exposures	

NB1: FUTURE POTENTIAL DISPOSAL OR TRANSFER OR ACQUISITION OF ASSETS AT ANY RTMC SITES.

NB2: RTMC INSURANCE CLAIMS HISTORY WILL BE PROVIDED.

3.2 REQUIREMENT

3.2.1 RTMC requires the successful bidder to provide a suitable replacement of electronic-related equipment, such as laptops, on loan at no additional cost to the RTMC until the claim is finalised.

3.3 POPIA ACT

3.3.1 By participating in this bid, the bidder undertakes to comply with the Protection of Personal Information Act, 2013 (Act No. 4 of 2013) (POPIA), and agrees to implement appropriate technical and organisational measures to safeguard all personal and confidential information against any unauthorised disclosure, misuse, or compromise.

3.4 ADDITIONAL INFORMATION TO BE SUPPLIED BY THE RTMC

3.4.1 To allow bidders to respond adequately to the bid, a schedule listing all assets and claims history will be provided.

3.4.2 The above exercise is aimed at ensuring uniformity in the response received from each prospective bidder and obtaining a structured framework for the evaluation of proposals.

3.4.3 The public liability proposal form will be shared with bidders who attended the compulsory briefing session as a guide.

3.5 REPORTING

3.5.1 The following reporting must be provided at intervals to be determined by RTMC.

- Weekly claims progress reports.

- Reconciliation of all claims data.
- Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.
- Performance Report recording any failures to achieve service levels, the cause of the failures and a summary of steps taken to resolve the failures and avoid them in the future.
- Ongoing evaluation of uninsured risks and possible options for addressing them.
- Updating the RTMC on the current state of the insurance market in terms of general economic realities, solvencies, capacity, profitability, rates and market activity and the possible impact of such matters on the RTMC's renewal strategy and insurance portfolio.
- Updating the RTMC on legal developments within the short-term insurance industry and informing the RTMC on insurance product developments in the South African market; and
- Reviewing the RTMC's short-term insurance portfolio with RTMC.
- Online claims tracking system.

3.6 ADVICE TO THE RTMC

3.6.1 The service provider must provide appropriate advice on the short-term insurance portfolio in the event of the RTMC requesting such advice and assisting the RTMC with the interpretation of the insurance policy documents and matters incidental thereto, including the interpretation of the insurance rules and regulations.

3.6.2 The service provider should further be able to review and advise on the short-term insurance requirements of the RTMC, and have the necessary expertise and infrastructure to respond to insurance enquiries and needs of the entity efficiently.

3.6.3 The service provider will be required to advise and consult with the RTMC on a renewal strategy, from time to time.

3.7 ADMINISTER CLAIMS

3.7.1 The service provider will be required to assist in the claims management process from submission to finalisation and reporting. The service provider must ensure that the contractual rights of the RTMC in terms of the insurance policy are protected and enforced.

3.7.2 The claims management process includes:

- Registering Claims
- Appointment of assessors
- Ongoing management of all outstanding claims;
- Receiving claims from the RTMC and processing them timeously;

- Updating on the progress of claims;
- Informing the RTMC of outstanding documents on claims, if applicable;
- Informing the RTMC when payments are made;
- Ensuring correct calculation and payment of benefits; and
- Online claims administration and tracking
- Recovery of third-party claims
- Monitor litigation

3.8 CLAIMS LOGGING AND TRACKING

3.8.1 The service provider must be able to provide a system to the RTMC which will enable it to log and submit claims and to track the status of said claims. An automated system for logging claims, as well as the tracking of progress.

3.9 PERFORMANCE MEASURES

3.9.1 The performance measures for the insurance service will be closely monitored by RTMC:

- Quarterly progress meetings or as and when required
- Monthly claims history/analysis or as and when required
- 30-day turnaround time on the outcome of claims
- Weekly claims reports
- Recommend preventative measures.

3.10 COMMUNICATION TO THE RTMC

3.10.1 The service provider shall be responsible for the following on an ongoing quarterly or annual basis, as appropriate:

- Update the RTMC on legal developments within the short-term insurance industry and inform the RTMC on short-term insurance product developments and the risk mitigation developments in the South African market.

3.11 TRANSITION

The service provider must:

3.11.1 Deliver a transition plan to the RTMC, which sets out how it will take over the services from the previous service providers and how it will set up its service delivery capability to deliver the services, as per their agreement, and

3.11.2 Assist with the handover to a new service provider at the expiration or earlier termination of the Agreement.

3.12 SUPPORT

The service provider must provide:

3.12.1 Training programmes, materials, processes, and guidelines

3.12.2 One-on-one dedicated Claims Consultant

3.13 VALUE-ADD SERVICES

The service provider is encouraged to propose value-added services available to RTMC on an ongoing basis, share new trends in the industry through appropriate educational awareness campaigns and recommend any improvements thereto.

SECTION: 3

EVALUATION CRITERIA

1. EVALUATION CRITERIA

The bid will be evaluated in the following stages:

(a) Stage 1 – <u>Standard Compliance Requirements</u>

Bidders are expected to submit and comply with all the required Standard Compliance Requirements. Failure to comply with these requirements will invalidate the bid. Below are the Standard Compliance requirements.

i. Bidders are required to submit bid documents as follows:
   - one original,
   - one hard copy

ii. PDF soft copy in a clearly marked/ labelled memory stick. Documents submitted as a soft copy must be the same documents as the hard copy (original).

iii. In case of a Joint Venture (JV), Consortium, Teaming Agreement, or similar relationship/agreement, bidders must submit standard bidding documents, i.e.
   - SBD 1, one consolidated SBD 1 for Joint Venture (JV), Consortium, Teaming Agreement, or similar relationship/agreement **signed by the authorized** person(s) (Proof of authority must be submitted, e.g., company resolution) and
   - SBD 4 for each entity/company in the JV or any agreement, for each of the entities in an agreed business relationship, accompanied by a signed agreement by all the parties concerned.
   - SBD 6.1 for each entity/company in the JV or any agreement, for each of the entities in an agreed business relationship, accompanied by a signed agreement by all the parties concerned.

iv. All returnable bid documents must be **signed by the authorized** person(s) (Proof of authority must be submitted, e.g. company resolution)

v. The layout of the required documents is set up in Table 1.1

vi. ***NB:*** *To prevent the abuse of the SCM system, RTMC will under no circumstances allow or promote bid rigging (or collusion bidding) from any bidder. For instance, bidders who submit bid documents on their own and enter into a Joint Venture Agreement or any other Agreement with another company using the same company, irrespective of whether declared on SBD 4 or not. Both bidders will be disqualified should such be identified.*

vii. Bidder(s) must be registered with National Treasury Centralised Supplier Database (CSD) – CSD report or CSD MAAA Reference Number.

viii. Compulsory briefing session certificate must be completed and enclosed with the tender documents.

(b) Stage 2 – Mandatory Requirements

Bidders who fail to meet the mandatory requirements will be disqualified from further evaluation.

(c) Stage 3 - Functionality Evaluation

This process comprises of written responses/ proposals, which consists of **100 points**. NB: Bidders will be required to score a minimum of **70 points** in order to qualify for a stage 4.

(d) Stage 4 – Price and Specific Goals Evaluation

i. Bidders will be evaluated on 80/20 Preference Point System (i.e., 80 points for price and 20 points for specific goals).

1.1 STAGE 1 – STANDARD COMPLIANCE REQUIREMENTS

STANDARD COMPLIANCE REQUIREMENTS	COMPLY (YES / NO)
ENVELOPE ONE (1)	
Total number of copies submitted – Two (2) (1 original and one copy) All the documentation under the bid proposal is to be converted and submitted in a PDF on a memory stick	
Proof of CSD Registration. (CSD number or report) Registration on CSD (available on www.csd.gov.za)	
Compulsory Briefing Session Certificate	
SBD 1: Invitation to bid and company information	
SBD 4: Declaration of interest	
SBD 6.1: Preference points claim form	
ENVELOPE TWO (2) – FINANCIAL PROPOSAL	
Total number of copies submitted – **(Two (2) one original and one copy)** All the documentation under the financial proposal is to be converted and submitted as a PDF on a memory stick	
Pricing Schedule (Annexure B) **NB. Bidders are required to complete the attached pricing schedule (either as issued or on the company letterhead)**	

NB: Failure to comply with the above requirements will lead to a disqualification of the bid.

1.2 STAGE 2 – MANDATORY REQUIREMENTS ACCORDING TO LICENCING CATEGORY

NOTE: A BIDDER WHO FAILS TO MEET THE BELOW MANDATORY REQUIREMENTS WILL BE DISQUALIFIED FROM FURTHER EVALUATION

The mandatory requirements for insurers and brokers differ; for insurers, please complete Table1 and for brokers, complete Table 2.

Table 1	**INSURERS (UNDERWRITER)**	
ITEM	**DESCRIPTION**	**COMPLY (YES / NO)**
1.	**Prudential Authority** Bidder must be licensed in terms of the Insurance Act **Compliance requirement**: A valid certificate of licensing issued by the Prudential Authority must be provided for evaluation.	
2.	**Financial Sector Conduct Authority (FSCA)** Bidder must be licensed as a Financial Services provider in terms of the Financial Advisory and Intermediary Services Act (FAISA). **Compliance requirement**: A valid certificate of registration with FSCA must be provided for evaluation.	
3.	**Key Account Manager/ Team Leader** The bidder must provide a Key Account Manager who possesses a Regulatory Examination (RE) certificate. **Compliance requirement**: A certified RE 5 certificate must be provided for evaluation	

Table 2	INSURANCE BROKERS	
ITEM	**DESCRIPTION**	**COMPLY (YES / NO)**
1.	**Financial Sector Conduct Authority (FSCA)** Bidder must be licensed as a Financial Service provider in terms of the Financial Advisory and Intermediary Services Act (FAISA). **Compliance requirement**: A valid certificate of registration with FSCA must be provided for evaluation.	
2.	**Professional Indemnity Cover** The bidder is required to have professional indemnity insurance cover. **Compliance requirement**: The bidder must attach proof of professional indemnity insurance cover with a minimum cover of **R50 million.**	
3.	**Key Account Manager/ Team Leader** The bidder must provide for a Key Account Manager who possesses a Regulatory Examination (RE) certificate. **Compliance requirement**: A certified RE 5 certificate must be provided for evaluation	

NB: Only bidders who qualify for stage 4 (Price and Specific Goals); their certificates of membership and/or qualification registrations will be verified by the Bid Evaluation Committee.

Failure to comply with the above requirements will lead to a disqualification of the bid.

STAGE 3 – FUNCTIONALITY CRITERIA

Functional evaluation will be based on written proposals and shall be evaluated based on the following parameters for functionality:

DESCRIPTION	POINTS
A. REFERENCES OF SIMILAR WORK DONE	**40**
The bidder (Company) must provide a reference of similar work done (Assets insured for the value of R30 million minimum). • Similar work done with a value ≥ R30 million and < R50 million = **15 points** • Similar work done with a value ≥ R50 million and < R100 million = **25 points** • Similar work done with a value ≥ R100 million = **40 points** **COMPLIANCE REQUIREMENT** Bidders are expected to attach copies of reference letters from Organisations/entities where similar services are currently and previously rendered. The following details must at least be reflected in the content of the reference letter/s: - • Name and short description of similar service rendered, • Addresses where the services are rendered, • Period of service, • Value of insurance cover, • Contactable References. (Letter of references in letterhead of the clients signed by authorized persons. Signature date on the reference letter must be from 2018 to date/ onwards) **AND attach a copy of the purchase order/ proof of appointment/ a copy of Service Level Agreement (SLA) or contract to the reference letter as supporting document.** Bidders are required to complete the attached template to reflect similar work done. The above details must be fully completed as provided on the attached template. **Bidders MUST ensure that information provided is accurate and correct as the RTMC reserves the right to conduct reference checks.**	

DESCRIPTION	POINTS
B. QUALIFICATIONS, SKILLS, EXPERIENCE OF PROPOSED PROJECT TEAM	**30**
The bidder's proposed personnel must have relevant insurance skills, qualifications, and minimum experience in line with Financial Sector Conduct Authority (FSCA) requirements. Bidder must provide abridged CVs and relevant qualification(s) for the following team members: **1. Team Leader/Account Manager = 15 Points** **Experience = 10 Points** The Team Leader/Account Manager must have at least five (5) years of experience as a team leader/accounts manager within the Insurance Industry ➢ 10 years and above = **10 Points** ➢ 8 – 9 years = **6 Points** ➢ 5 – 7 years = **4 Points** **Compliance Requirement** CV indicating clearly the number of years as a Team Leader/Accounts Manager within the insurance industry. Where a Team Leader/Accounts Manager has been with various organisations, the CV must clearly indicate the organisation's and related period for each organisation to enable the Corporation to calculate the number of years accurately. **E.g.** ✓ Name of Organisation Period 01 January 2021 to 31 December 2025 (Total Years – 5yrs) ✓ Name of Organisation Period 01 January 2021 to 30 June 2025 (Total Years – 4 yrs 6 months) **Qualification = 5 Points** The team leader must be in possession of relevant qualifications and an industry-specific certification for financial services providers and compliance officers as detailed in Board Notice 51 of 2017 (Government Gazette no 40785 of 13 April 2017). Kindly see the link below for more information. https://www.masthead.co.za/wp-content/uploads/2017/05/20170413_Board-Notice-51-of-2017_-Amendments-to-FAIS-Recognised-Qualific....pdf	

DESCRIPTION	POINTS
Compliance Requirement The bidder must attach a copy of a relevant Diploma or Degree Certificate. Only NQF Level 6 and above will be accepted. **2. Claims Consultant/Administrator = 15 Points** **Experience (10)** The Claims Consultant/Administrator must have at least three (3) years of experience as a claims consultant/administrator within the Insurance Industry • 6 years and above = **10 Points** • 3 – 5 years = **5 Points** **Compliance Requirement** CV indicating clearly the number of years as a Claims Consultant/Administrator within the insurance industry. Where a Claims Consultant/Administrator has been with various organisations, the CV must clearly indicate the organisation's and related period for each organisation to enable the Corporation to calculate the number of years accurately. E.g. ✓ Name of Organisation Period 01 January 2021 to 31 December 2025 (Total Years – 5yrs) ✓ Name of Organisation Period 01 January 2021 to 30 June 2025 (Total Years – 4 yrs 6 months) **Qualification (5)** The Claims Consultant/Administrator must be in possession of any qualification • Matric = **2 Points** • Post Matric Certificate = **3 Points** • Diploma or Degree Certificate (NQF Level 6 or more) = **5 Points** **Compliance Requirement** The bidder must attach a copy of a recognised qualification.	

<table>
<tr><th>DESCRIPTION</th><th>POINTS</th></tr>
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<tr><td>C. TRANSITIONAL PLAN AND REPORTING</td><td>30</td></tr>
<tr><td>
The bidder is required to submit a detailed transitional plan with:

Timelines which set out how it will take over the services from the previous service provider (Not exceeding a month) = 5 points
How it will set up its service delivery capability to deliver the services without interruption of service = 3 Points

Setting up a meeting with RTMC (1)
Setting up a meeting with the current service provider (1)
Onboarding RTMC personnel on the online system (1)

Migration of claims registers = 3 Points
Transfer of outstanding claims= 3 Points
Transfer of policy schedules = 3 Points

REPORTING
The bidder is expected to provide examples of the following:
<ol start="6">
Reconciliation of all claims data = 3 Points
Monthly claims progress reports = 3 Points
Online claims tracking system = 3 Points
Performance report recording any failures to achieve service levels, the cause of the failures, and a summary of steps taken to resolve the failures and avoid them in the future. (dashboard) = 4 Points

Compliance requirement
The bidder must attach a detailed transitional plan and reporting requirements as required above.
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<tr><td>TOTAL POINTS</td><td>100</td></tr>
</table>

NB: BIDDERS ARE EXPECTED TO SCORE A MINIMUM OF SEVENTY (70) POINTS TO QUALIFY FOR STAGE 4.

2. STAGE 4 – PRICE AND SPECIFIC GOAL EVALUATION

CRITERIA	MAXIMUM POINTS
Price	80
Black Owned Company	4
Women Owned Company	6
Youth Owned Company	4
*Company owned by people living with disabilities	6
Grand Total	**100**

***Letter from a medical practitioner confirming disability must be submitted when these points are claimed.**

SECTION: 4
ANNEXURE AND STANDARD BIDDING DOCUMENTS

See the attached SBD forms.

(All SBD forms must be signed)

BIDDING DOCUMENTS: GENERAL INFORMATION

1. The bidding forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional shall be provided in the enclosed questionnaire(s) or a separate annexure.

2. The bidding forms should not be retyped or redrafted; photocopies may be prepared and used. Additional offers may be made for any item, but only on a page photocopy. Additional offers made in any other manner may be disregarded.

3. Bidding forms not filled in using a computer and printer shall be completed in black ink.

4. Bidders shall check the numbers of the pages and satisfy themselves that all are included and duplicated. No liability shall be accepted regarding claims arising from the fact that pages are missing or duplicated.

5. If attached, the forms regarding the Preference Points Claim shall be completed and submitted with the completed bid.

6. Firm bid prices and delivery periods are preferred. Consequently, bidders shall clearly state whether prices and delivery periods will remain firm for the duration of the contract.

7. If non-firm prices are submitted, the bidding documents should clearly state this.

8. Where items are specified in detail, the specifications from an integral part of the bidding document and bidders shall indicate in the space provided whether the items offered are to specification.

9. Regarding the paragraphs where the items offered are strict to specification, bidders shall insert the words "as specified."

BIDDING DOCUMENTS: GENERAL INFORMATION

10. In cases where the items are not to specification, the deviations from the specifications shall be indicated.

11. The bid prices shall be given in the units shown.

12. All prices shall be quoted in South African currency.