



REQUEST FOR PROPOSAL

BID NUMBER: ECIC04P-2025/26

SHORT-TERM INSURANCE BROKERAGE SERVICES FOR FIVE YEARS

CLOSING DATE: 27 JANUARY 2026

CLOSING TIME: 11H00 (SAST, OBTAINABLE BY DIALLING TELKOM ON 1026)

Address Byls Bridge Office Park, Building 9, Fourth Floor, 11 Byls Bridge Boulevard, Highveld Extension 73, Centurion, 0157, South Africa
Tel +27 (0)12 471 3800 | **Email** info@ecic.co.za | **Website** www.ecic.co.za

Directors: Ms. DP Ndlovu (Chair), Mr. NG Maphula (Acting CEO), Mr. S Mayekiso, Ms. SK O' Mahony, Mr. BI Mkhize, Ms. PM Mthethwa, Ms. XE Daku; Mr. W van Der Spuy, *Mr. L. Govender | **Company Secretary:** Ms. N Moffatt

Company registration no: 2001/013128/30 | ECIC is a licensed non-life insurer and authorised Financial Services Provider (FSP 30656).
Currently exempted in terms of FAIS Notice 78 of 2019.

*alternate to Mr. W van Der Spuy

YOUR EXPORT RISK PARTNER

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A. INTRODUCTION TO THE REQUEST FOR PROPOSAL (RFP)

1. Introduction

- 1.1. The Export Credit Insurance Corporation of South Africa (SOC) Limited (ECIC or Corporation)¹ is a self-sustained state-owned entity listed under Schedule 3B of the Public Finance Management Act 1 of 1999 (as amended) and established in terms of the Export Credit and Foreign Investments Insurance Act 78 of 1957 (as amended).
- 1.2. The mandate of ECIC is to facilitate and encourage South African export trade, by underwriting export credit loans and investments outside the country, to enable South African contractors to win capital goods and services contracts in countries outside South Africa. ECIC is a registered Financial Service Provider and is regulated by the Financial Sector Conduct Authority and Prudential Authority (FSP No: 30656). Currently exempted in terms of FAIS Notice 78 of 2019.
- 1.3. ECIC operates at the following address:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

2. Purpose

- 2.1. The purpose of this Request for Proposal (RFP) is to appoint a service provider to provide short-term insurance brokerage services to the ECIC for five years.
- 2.2. The current insurance contract expires on 31 May 2026, and the appointed bidder must ensure that ECIC is covered for all risks with effect from 1 June 2026.

3. Pricing

- 3.1. Bidders are required to quote ECIC on brokerage fees only. The quotation can either be on a percentage **or** a Rand amount. Depending on the fee mode chosen, the bidder must quote ECIC for the contract period as follows:

- 3.1.1. Fee model: percentage basis:

Table 1

Period	Brokerage Fee (in percentage inclusive of Value Added Tax)
Year 1	XX%
Year 2	XX%
Year 3	XX%
Year 4	XX%
Year 5	XX%

¹ Further information on the ECIC can be found at www.ecic.co.za

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or

3.1.2. Fee model: Rand amount

Table 2

Period	Brokerage Fee (in Rand amount inclusive of Value Added Tax)
Year 1	RXXX.XX
Year 2	RXXX.XX
Year 3	RXXX.XX
Year 4	RXXX.XX
Year 5	RXXX.XX

- 3.2. Notwithstanding the fee mode, all quotations must be inclusive of Value Added Tax unless indicated otherwise on the quotation. The pricing shall be firm for the entire contract period, and no increases will be allowed.
- 3.3. For comparative purposes, ECIC will convert the brokerage fee quoted in percentage to a rand amount, using an assumed yearly premium of R850 000.00 (note that the final premium will only be known once the appointed bidder has sourced insurance for ECIC from the market and ECIC accepts the insurance quotations).
- 3.4. All quotations must be on the letterhead of the bidder.

4. Background

- 4.1. The Corporation needs to secure the services of a South African insurance broker with experience, expertise and capacity to act as an intermediary between the ECIC and the insurance market. The appointment will be for a period of five years. The detailed scope of services is as follows:
- 4.1.1. The bidders' attention is drawn to the following information, which will allow bidders to make informed and comprehensive proposals:

Summary of Cover - Types of cover and sums insured are based on the existing sums insured. ECIC reserves the right to adjust details, if necessary, at the final placement of the insurance, as well as during the period of the contract.

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B. TERMS OF REFERENCE

5. Scope of services

- 5.1. The appointed bidder will be required to provide short-term insurance brokerage services, including the following services:

5.1.1. Administration

- 5.1.1.1. Reviewing the existing covers, limits and sums insured is aligned to the risk profile of the Corporation to ensure adequate coverage. Provide advice for adequate insurance coverage.
- 5.1.1.2. Obtain short-term insurance coverage from the insurance industry based on the needs of ECIC, which include, but are not limited to, the following:
 - 5.1.1.2.1. Assets insurance (fixtures and fittings, all tangible assets).
 - 5.1.1.2.2. Computer equipment (including, but not limited to, laptops, cell phones, tablets).
 - 5.1.1.2.3. Directors and officers liability.
 - 5.1.1.2.4. Public liability.
 - 5.1.1.2.5. Employment practices liability.
 - 5.1.1.2.6. Motor vehicle (including road assistance).
 - 5.1.1.2.7. Crime and civil liability.
 - 5.1.1.2.8. SASRIA (both motor and fire) (Riot, strike, etc.).
 - 5.1.1.2.9. Cyber risk (cyber liability) insurance, etc:
 - 5.1.1.2.9.1. First Party Loss (Business interruption resulting from cyber extortion, system failures, security breach, etc.).
 - 5.1.1.2.9.2. Data breach response costs (includes forensic investigation, notification, recovery of systems and data, etc.).
 - 5.1.1.2.9.3. Regulatory fines.
 - 5.1.1.2.9.4. Liability.
 - 5.1.1.2.9.5. eCrime (such as funds transfer fraud, fraudulent instruction, etc.).

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The comprehensive asset register will be shared with the appointed bidder. This bid is for appointing an insurance broker who will then source insurance cover for ECIC.

5.1.2. Reporting

Quarterly

5.1.2.1. The appointed bidder must provide quarterly reports, which may be tailored to ECIC's requirements and must include, but not be limited to:

5.1.2.1.1. Dashboard;

5.1.2.1.2. Motor vehicle reports; and

5.1.2.1.3. Non-motor reports.

5.1.2.2. The appointed bidder must provide quarterly reconciliation (motor and non-motor reports) of all claims data and contributions (including self-insured component) of:

5.1.2.2.1. Claims received and registered;

5.1.2.2.2. Claims submitted to the insurance company;

5.1.2.2.3. Outstanding claim documents and the reasons thereof;

5.1.2.2.4. Payments made on claims, including verifying the correctness of the payment calculation by the insurance company;

5.1.2.2.5. Repudiated claims;

5.1.2.2.6. Measures taken by the appointed bidder through a third-party supplier to address repudiated claims, including progress made on any litigation process in connection with a repudiated claim; and

5.1.2.2.7. Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.

5.1.2.2.8. Update ECIC on the current state of the insurance market in terms of general economic realities, solvencies, capacity, profitability, rates and market activity (such as mergers, amalgamations, take-overs and joint ventures) and the possible impact of such matters on ECIC's renewal strategy and insurance portfolio;

5.1.2.2.9. Update ECIC on legal developments within the short-term insurance industry and inform ECIC on insurance product

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developments and the risk mitigation developments in the South African market;

5.1.2.2.10. Ongoing evaluation of uninsured risks and possible options for addressing them;

5.1.2.2.11. Ongoing analysis of loss statistics to identify trends to assist ECIC in future loss prevention and more effective management of risk;

5.1.2.2.12. Inform ECIC when the financial strength rating of an insurer and /or underwriter has changed;

5.1.2.2.13. Advising ECIC regarding any reserve accounts with the insurer(s) and

5.1.2.2.14. Quarterly reports must be submitted to ECIC by no later than the 15th of the month following the end of a quarter.

5.1.2.3. 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.

Note: All reports will be continuously reviewed and tailor-made to meet ECIC's needs at the time of review.

5.1.2.4. Risk management report (on an annual basis).

5.1.3. Meetings

5.1.3.1. The appointed bidder will be required to review the ECIC short-term insurance portfolio with ECIC (if necessary) in a formalised pre-set meeting as and when required.

5.1.3.2. The appointed bidder 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 customer relationship review as and when required.

5.1.4. Advice to ECIC

5.1.4.1. The appointed bidder must provide financial advice on the short-term insurance portfolio in the event ECIC requests such advice within the timelines as agreed to from time to time and must furthermore assist ECIC with the interpretation of insurance policy documents and matters incidental thereto, including the interpretation of insurance rules and regulations.

5.1.4.2. Where advice given results in a loss to ECIC, consequence management will apply in accordance with the service level agreement.

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6. Claims history

6.1. The claims history of ECIC in the past three years is as follows:

Table 3

Description of Loss	Claims Status	Event	Cover	Gross
Furniture: Damaged while being transported	Closed - documents outstanding.	Accidental Damage	Office Contents	R39 145.00
Furniture: The Picture fell and broke whilst being transported.	Closed - Settled by the insurer.	Damage	Property Damage Section	R7 313.16
Computer equipment: The Laptop fell from the table and got damaged.	Closed - Settled by the insurer.	Damage	Electronic Equipment	R24 643.83
Computer equipment: iPad screen cracked	Closed - Settled by the insurer.	Damage	Electronic Equipment	R27 030.00

7. Current value of assets and current insurance cover

7.1. The table below indicates the type of the current cover and sums insured:

Table 4

TYPE OF COVER REQUIRED	SUM INSURED AS AT CURRENT
Value of assets to be insured	
Office Equipment	R709 020
Furniture and fittings	R3 546 830
Motor car: Volkswagen Polo Vivo 1.4	R119 000
Computer Equipment -Electronic equipment (laptops and accessories; hardware, TVs)	R6 133 542
Current cover	
Public Liability (according to paragraph 5.1.1.1)	R4 000 000.00
Directors and Officers Liability (according to paragraph 5.1.1.1)	R50 000 000.00
Crime and Civil Liability (according to paragraph 5.1.1.1)	R10 000 000.00
Employment Practices Liability (according to paragraph 5.1.1.1)	R5 000 000.00
Cyber liability (according to paragraph 5.1.1.1)	R10 000 000.00

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TYPE OF COVER REQUIRED	SUM INSURED AS AT CURRENT
Roadside Assistance	
SASRIA Fire	
SASRIA Motor	

- 7.2. The comprehensive asset register will be shared with the appointed bidder. This bid is for appointing an insurance broker who will then source insurance cover for ECIC.

8. Due diligence/site inspection

- 8.1. At the ECIC's discretion, due diligence and/or site inspection may be conducted on the identified bidder. ECIC will visit the identified bidders' premises or the bidder's client (with permission from the bidder) to verify information as contained in their respective bid documents.
- 8.2. Where applicable, the ECIC will issue criteria for the due diligence review or site inspection beforehand to the applicable bidder(s). Should it be discovered during a due diligence visit or site inspection that the information submitted by the identified bidder is inconsistent with what is on their current premises of business, ECIC reserves the right to disqualify such bidder.
- 8.3. ECIC may identify another bidder using the next highest points obtained in the evaluation phase, as stipulated in paragraph 9.1.4, taking into consideration the process followed under paragraphs 8.1 and 8.2.

9. Bid evaluation

- 9.1. The proposals will be evaluated in phases as highlighted below and detailed in paragraphs 9.1.1 to 14 of this document:

9.1.1. Phase One: Compliance

- 9.1.1.1. In this evaluation stage, bidders are expected to submit proposals that are in line with the requirements of this bid in all material respects. If the proposal submitted is not in line with the requirements of this bid, the proposal will be considered an unacceptable bid and will be disqualified from further evaluation.

9.1.2. Phase Two: Pre-qualification

- 9.1.2.1. The bidder must be authorised by the Financial Sector Conduct Authority (FSCA) as a Financial Service Provider (FSP) and be approved for Short Term Insurance Commercial lines products (advice, non-automated with intermediary, other). The bidder must provide their valid FSP Number or a copy of their FSP Certificate. The FSP Number

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will be used to verify authorisation as an FSP, the products authorised for it, and whether those products meet the requirements of ECIC. The verification will be conducted using the FSCA website.

- 9.1.2.2. Where a bidder fails to meet the requirements as listed in paragraph 9.1.2.1, their proposal will be considered an unacceptable bid and will be disqualified from further evaluation.

9.1.3. **Phase Three: Functional evaluation (Desktop evaluation)**

In this evaluation phase, refer to paragraph 10 for detailed information, bidders are expected to obtain a minimum of 80 out of 100 points to proceed to the next evaluation stage. Failure to obtain the prescribed minimum points will result in the proposal being considered an unacceptable bid and disqualified from further evaluation.

9.1.4. **Phase Four: Preference point system**

The 80/20 preference point system shall apply to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price, and 20 points represent the maximum obtainable points for Specific Goals. Points will be awarded to a bidder for attaining the Specific Goals under the table as listed in the bid documentation (refer to paragraph 11, read together with the table on page 33 (paragraph 4.1)).

9.1.5. **Phase Five: Objective criteria**

ECIC will apply objective criteria as detailed in paragraph 13.

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10. Evaluation Phase Three: Functional

- 10.1. The proposal submitted by the bidder will be evaluated by the ECIC based on the following criteria and will be rated as the factor score over 5 multiplied by the applicable points:

Factor scores: 0=Poor, 1=Below average, 2=Average, 3=Good, 4=Very Good, 5=Excellent

Table 5

EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
1. Bidder's experience	1.1.The bidder is to demonstrate at least 5 years' experience in providing comprehensive short-term brokerage insurance services (commercial lines). Bidders are to provide a list of contactable clients as proof thereof.	1.1.1. Less than five years' experience.	0	20	40
		1.1.2. The demonstrable experience is five years or above.	5		
	1.2.The bidder is to provide at least three contactable references from clients to whom comprehensive short-term brokerage insurance services (commercial lines) were rendered.	1.2.1. No reference(s) provided, or reference(s) provided are not for the short-term brokerage insurance services industry.	0	20	
		1.2.2. One reference provided.	1		
		1.2.3. Two references provided.	3		
		1.2.4. At least three references provided.	5		
2. Bidder's capacity to deliver	2.1.Project Manager / Team Leader has at least 5 years of experience in the comprehensive short-term brokerage insurance (commercial lines) services industry.	2.1.1. Less than five years' experience.	0	20	20
		2.1.2. Demonstrable experience of five years or above.	5		
	Project Manager/Team Leader CV to be attached.				

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EVALUATION CRITERIA	EVALUATION CRITERIA DESCRIPTION	DESCRIPTION OF POINTS ALLOCATION		SUB POINTS	POINTS
		DETAILS/INFORMATION	RATING		
3. Approach and methodology.	3.1.The bidder must provide the following: a. Detailed claim process to be adopted and implemented by the ECIC. b. Demonstrate the effectiveness and efficiency of seven (7) working days turnaround time in processing claims.	3.1.1. Bidder did not provide a detailed claim process nor a demonstration of the effectiveness and efficiency of seven (7) working days turnaround time in processing claims.	0	40	40
		3.1.2. Bidder provided an incomplete detailed claim process and demonstration of the effectiveness and efficiency of seven (7) working days turnaround time in processing claims.	1-3		
		3.1.3. Bidder detailed the claim process and demonstrated the effectiveness and efficiency of seven (7) working days turnaround time in processing claims as required.	4-5		
Total					100

10.2. Total points achieved under this evaluation criterion will be rounded to the nearest two decimal places.

10.3. Bidders are expected to obtain a minimum of 80 out of 100 points to proceed to the next evaluation stage of the evaluation. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation phase.

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11. Evaluation Phase Four: Preference point system

11.1. The formula below will be used to calculate the lowest acceptable bid price:

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration;

P_t = Comparative price of bid or offer under consideration; and

P_{min} = Price of the lowest acceptable tender.

11.2. Depending on the bidder's level of Specific Goals, a maximum of 20 Specific Goals points may be awarded to a bidder. The points scored by a bidder for Specific Goals will be added to the points allocated for price.

11.3. The table below reflects the number of points to be allocated to a bidder for Specific Goals:

Table 6

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)
B-BBEE Procurement Recognition Level of 135% and at least 50.1% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	20
B-BBEE Procurement Recognition Level of at least 110% and at least 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	10
B-BBEE Procurement Recognition Level of at least 110% and up to 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	5
Any other B-BBEE Procurement Recognition Level up to 110%.	0

[BIDDERS ARE REQUIRED TO INDICATE, IN ONE BLOCK, THE NUMBER OF POINTS THEY ARE CLAIMING FOR SPECIFIC GOALS IN THE TABLE IN

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PAGE 33 (PARAGRAPH 4.1). IN THE EVENT WHERE A BIDDER MAKES A MARK (ONE MARK), ECIC WILL CONSIDER THE CORRESPONDING POINTS TO BE THE ONE WHICH THE BIDDER IS CLAIMING FOR. WHERE A BIDDER MAKES MULTIPLE MARKS OR DOES NOT MAKE ANY MARK OR INDICATION AT ALL IN THE TABLE, THE BIDDER WILL BE ALLOCATED ZERO (0) POINTS FOR SPECIFIC GOALS, NOTWITHSTANDING EVIDENCE PROVIDED.]

11.4. The total points achieved under this evaluation criterion will be rounded to the nearest two decimal places.

12. Document(s) required to substantiate claims for Specific Goals

12.1. For this bid, bidders are requested to provide the following documents in substantiation for their claim of Specific Goals in line with the 2022 Preferential Procurement Regulations:

Table 7

Specific Goals	Document required to substantiate the Specific Goals claim
B-BBEE Procurement Recognition Level	Copy of a valid B-BBEE Certificate or Copy of a valid Sworn Affidavit

12.2. Any bid received from a bidder who did not provide the document requested in this paragraph 12 and do not indicate the number of Specific Goals they are claiming for in the SBD6.1 Form, **in the table on page 33 (paragraph 4.1)** shall be awarded zero points for Specific Goals (i.e. both the document required to substantiate the Specific Goals Claimed and the SBD6.1 must be submitted with the response to this bid).

12.3. Points for Specific Goals will be allocated as indicated in paragraph 11 of this RFP and in the SBD 6.1 Form. Bidders are required to indicate how they claim points for each preference point on the SBD6.1 Form, **in the table on page 33 (paragraph 4.1)**. In the event that a bidder does not indicate the preference points they are claiming, the bidder will be awarded zero (0) points for Specific Goals.

13. Phase Five: Objective criteria

13.1. In this evaluation stage, ECIC will check if the bidder has a person who meets the following criteria in awarding the bid:

13.1.1. The bidder has a significant shareholder or owner (or equivalent) (directly or indirectly) who is classified or can be classified as a Prominent Influential Person (PIP) in accordance with the Financial Intelligence Centre Act, 38 of 2001 (FICA).

13.1.2. The bidder has a shareholder or member or owner or director (or equivalent) who has questionable integrity status.

13.1.3. The bidder has a director or equivalent who is classified or can be classified as a PIP in accordance with FICA.

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- 10.1 Should it be found during this evaluation stage that the bidder who has attained the highest points under Evaluation Stage Four (Preference Point System) has persons listed in paragraphs 13.1.1 to 13.1.3, ECIC reserves the right to conduct further due diligence on the person(s). Should the outcome of further due diligence not be satisfactory to ECIC, or if such a person(s) poses an unacceptable high risk reputation and/or integrity of the person(s) be questionable, ECIC reserves the right not to award the bid to that bidder. This process may be repeated for the next bidder if so required.

14. Standard bidding documents

- 14.1. Bidders are required to complete and attach the following Standard Bidding Documents:

Table 8

DETAILS	REFERENCE NUMBER
Invitation to bid	SBD 1
Declaration of Interest	SBD 4
Preference Points Claim Form for Preferential Procurement Regulations 2022 Should a bidder not complete and sign the SBD6.1, the bidder will be allocated 0.00 points for Specific Goals.	SBD 6.1

- 14.2. ECIC will not award a bid to a bidder who has not submitted complete and signed Standard Bidding Documents, and the Standard Bidding Documents forms part of the condition of award.

15. Instructions to respondents

15.1. Correspondence

- 15.1.1. No telephonic or any other form of communication with any other ECIC member of staff other than the named individual below, relating to this RFP, will be permitted. All enquiries must be in writing only.
- 15.1.2. All questions relating to the contents of the tender (conditions, rules, terms of reference, etc.) must be forwarded in writing via email to procurement@ecic.co.za by not later than 14 January 2026. Questions received after this date will not be entertained.
- 15.1.3. All questions must reference specific paragraph numbers, where applicable.
- 15.1.4. All enquiries (received on or before the closing date for enquiries) will be consolidated, and ECIC will publish one response document on the ECIC

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website (www.ecic.co.za) within three working days after the date indicated in paragraph 15.1.2, on or before 20 January 2026.

- 15.1.5. No requests for information shall be made to any other person or place, and in particular not to the existing provider of this service.

15.2. Submission of the proposals

- 15.2.1. Bid documents must be clearly marked for ease of reference and be submitted in PDF format on/or before the closing date and time to the following email address:

procurement@ecic.co.za

- 15.2.2. The following email submission procedures or protocols must be adhered to ensure safe and secure submission of the tender documents and supporting documents:

15.2.2.1. The tender document, including the supporting or returnable documents, should be submitted via email in PDF format.

15.2.2.2. If the PDF tender document, including the supporting or returnable documents, is less than 20 Megabytes (MB), it should be submitted as one document. If the electronic bid document is more than 20MB, the electronic tender document should be split in order to adhere to the 20MB email capacity.

15.2.2.3. Bidders are also encouraged to submit a USB detailing their tender proposals.

- 15.2.3. In the event that bidders are experiencing challenges with emailing documents, tenders can be hand-delivered at the ECIC Offices on/or before the closing date and time at:

Byls Bridge Office Park
Building 9, Fourth Floor
11 Byls Bridge Boulevard
Highveld Extension 73
Centurion
0157

- 15.2.4. **Any proposal received after the closing date and time will not be accepted.**

- 15.2.5. All proposals and all subsequent information received from respondents will not be returned. The proposals should be addressed to the Head of Procurement of ECIC.

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16. Timeline of the bid process

- 16.1. The period of validity of the tender and the withdrawal of offers, after the closing date and time, is 185 days, expiring on 31 July 2026. If there is a need to extend the bid validity period, ECIC will request, in writing, permission to extend the validity period from all bidders before the expiry of the current validity period.
- 16.2. After the due date for response from bidders on the request to extend the validity period, ECIC will assume that all bidders have agreed to the request to extend and continue evaluating all bids received at the closing date and time as received on the closing date and time. Any award will be on the quoted bid amount as indicated in the proposal as at the closing date and time of the bid. If a bidder does not agree to extend the validity period on the original terms (as at the closing date of the bid), ECIC will stop evaluating the proposal received from such bidder.
- 16.3. The project timeframes of this bid are set out below:

Table 9

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on the Government e-tender portal /ECIC Website	12 December 2025
2.	Questions relating to the bid from the bidder(s)	14 January 2026
3.	Response to the questions from the bidders	20 January 2026
4.	Bid closing	27 January 2026
5.	Compliance Evaluation	6 February 2026
6.	Functional Evaluation	6 February 2026
7.	Preference Points	13 February 2026
8.	Bid Adjudication	27 February 2026

- 16.4. All dates and times in this bid are in South African Standard Time.
- 16.5. Any time or date in this bid is subject to change at the discretion of ECIC. The establishment of a time or date in this bid does not create an obligation on the part of ECIC to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if ECIC extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.
- 16.6. ECIC will notify all bidders of the outcome of the bid within 10 days from the date of acceptance of bid by the identified bidder.

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17. Bid rules

17.1. Awarding a bid

17.1.1. ECIC will not award a bid to a bidder:

17.1.1.1. Who is or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder are restricted to conduct business with the State.

17.1.1.2. Who is in the employ of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who is in the employ of the State as contemplated in the Public Administration Management Act, 11 of 2014 and is prohibited from conducting business with the State in terms of section of PAMA.

17.1.1.3. Who is in the service of the State or has a director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder and has not declared their business interest as required in the applicable SBD4 form.

17.1.1.4. Has been found to have transgressed Prevention and Combating of Corrupt Activities Act, 12 of 2004 (as amended).

17.1.1.5. Has been found to have transgressed or is transgressing the Competition Act, 89 of 1998 (as amended).

17.1.2. ECIC shall not award a bid or contract or order to a bidder whose tax affairs are not compliant, except to foreign bidders with no tax obligations in South Africa.

17.1.3. For a bidder or the bidder's director(s), trustee(s), shareholder(s), member(s), partners(s) or any person(s) having controlling interest in the bidder who have declared their business interest as required in the applicable SBD4 form, ECIC will not award a bid to a bidder who has declared their interest and:

17.1.3.1. Is prohibited from conducting business with the State; or

17.1.3.2. Does not have permission to conduct remunerative work outside their employment.

17.1.4. ECIC will verify with the relevant Organ of State to determine if paragraphs 17.1.3.1 and 17.1.3.2 are not applicable.

17.1.5. ECIC will assume that, the person contemplated in paragraph 17.1.3 is prohibited from conducting business with the State or the person does not

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have permission to conduct remunerative work outside their employment if it does not receive any response within 21 days from such verification request to an Organ of State.

- 17.1.6. ECIC will then recommend to award the bid to the bidder who achieved the second highest preference points, and should it be established that the bidder who achieved the second highest preference points has a person contemplated in paragraph 17.1.3, ECIC will conduct verification as contemplated in paragraphs 17.1.4 and 17.1.5. This step can be performed up to the bidder who achieved the third highest preference points.

17.2. Documents/information required as a condition of award

- 17.2.1. Proof of registration: Valid registration on the National Treasury Central Supplier Database (CSD).
- 17.2.2. Completed and signed Standard Bidding Forms as follows:

Table 10

Invitation to bid (all bidders must ensure that this Form is duly completed and signed)	SBD 1
Declaration of Interest	SBD 4
Preference Points Claim Form	SBD 6.1

17.3. Sub-contracting

- 17.3.1. ECIC fully endorses the South African Government's transformation and empowerment objectives and in awarding the tender or contract, preference may be given to bidders (Generics) who are willing to subcontract not less than 30% of the contract to a company which is Black Owned, Black Women Owned, Black Youth Owned, owned by Black People with Disabilities, an EMEs and QSE. EME's and QSE's are allowed to bid without subcontracting.
- 17.3.2. If contemplating subcontracting, please note that a bidder will not be awarded points for Specific Goals if it is indicated in its Proposal that such bidder intends subcontracting more than 30% (thirty percent) of the value of the contract to an entity/entity that do not qualify for at least the same points that the bidder qualifies for, unless the intended subcontractor is a company which is Black Owned, Black Women Owned, Black Youth Owned, owned by Black People with Disabilities, an EME and QSE , with the capability to execute the subcontract.
- 17.3.3. A person awarded a contract may not subcontract more than 25% (twenty five) of the value of the contract to any other enterprise that does not have an equal or higher Specific Goals than the person concerned, unless the

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contract is subcontracted to an EME that has the capability and ability to execute the subcontract.

17.4. ECIC's rights

17.4.1. ECIC reserves the right to:

- 17.4.1.1. Amend any bid conditions, bid validity period, bid specifications, or extend the bid closing date, all before the bid closing date. Such amendments will be posted on the ECIC's website under the relevant tender information. All prospective bidders must therefore ensure that they visit the website of ECIC (www.ecic.co.za) regularly before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 17.4.1.2. Cancel or withdraw this bid at any time, as a whole or in part without reasons and without attracting any liability.
- 17.4.1.3. Award this bid to more than one bidder.
- 17.4.1.4. Award this bid in total or part.
- 17.4.1.5. Negotiate with all or some of the shortlisted bidders.
- 17.4.1.6. Not accept the lowest priced bid or award the bid to a bidder other than the highest scoring bidder.
- 17.4.1.7. Conduct site visits at bidder's offices and / or at client sites if so required.
- 17.4.1.8. Request any relevant information and/ or documents to verify or clarify information supplied in the bid response in relation, but not limited to the structure of the bidding entity, bidder's capacity, proposed solution, proposed timelines etc.

17.5. Contract fees

- 17.5.1. Where a bidder indicates that its prices are subject to confirmation, or are in any way conditional, such pricing will not be considered.

17.6. Confidentiality

- 17.6.1. Any information relating to the submissions, through the process or otherwise, shall be treated in strict confidence. In submitting a response, a Service provider agrees that it shall not be entitled to any information disclosed by another respondent to ECIC, which ECIC has determined to be of a confidential nature. The content and details of the evaluation of submissions will remain confidential to ECIC.

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17.7. Other matters

17.7.1. If the ECIC does not accept any proposal, it will declare this bid process closed and may then elect to:

17.7.1.1. Proceed on a completely different basis; and/or

17.7.1.2. Not to appoint any respondent (in the event it deems all or any of the proposals not appropriate).

17.7.2. The ECIC reserves the right to engage in any processes required to validate all claims made in the proposal.

17.7.3. The ECIC has the right to enter into negotiation with a prospective Service provider regarding any terms and conditions, including fees, of a proposed contract.

17.8. Disclaimer

17.8.1. The ECIC has produced this bid in good faith. However, the ECIC, its agents and its employees and associates, do not warrant its accuracy or completeness. The ECIC will not be liable for any claim whatsoever and howsoever arising (including, without limitation, any claim in contract, negligence or otherwise) for any incorrect or misleading information contained in this bid due to any misinterpretation of this bid.

17.8.2. This bid is a request for proposals only and not an offer document; answers to it must not be construed as acceptance of an offer or imply the existence of a contract between the ECIC and the bidder.

17.9. Terms of engagement

17.9.1. The ECIC's engagement of the service provider will be documented in a contract between the ECIC and the appointed bidder.

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ANNEXES

Annexure A: Protection of personal information

1. ECIC recognises that when the Bidder submit its proposal in response to this Request for Quotations, it will provide personal information, which ECIC will process for the sole purpose of evaluating the Bidder's proposal. By submitting its proposal in responding to this Request for Quotations, the Bidder hereby provide its consent to the processing of its Personal Information by ECIC.
2. The following terms shall have the meaning ascribed to them:
 - 2.1. **"Personal Information"** shall bear the same meaning as ascribed to it under POPI;
 - 2.2. **"POPI"** means Protection of Personal Information Act, No. 4 of 2013;
 - 2.3. **"Responsible Party"** shall bear the same meaning as ascribed to it under POPI; and
 - 2.4. **"bid"** means this Request for Quotations.
3. ECIC as the Responsible Party undertakes to:
 - 3.1. comply with the provisions of POPI as well as all applicable legislation as amended or substituted from time to time;
 - 3.2. treat all Personal Information strictly as defined within the parameters of POPI;
 - 3.3. process Personal Information only in accordance with the consent it was obtained for, for the purpose agreed, as permitted by law;
 - 3.4. secure the integrity and confidentiality of any Personal Information in its possession or under its control by taking appropriate, reasonable technical and organisational measures to prevent loss, damage, unauthorised destruction, access, use, disclosure or any other unlawful processing of Personal Information;
 - 3.5. not transfer any Personal Information to any third party in a foreign country unless such transfer complies with the relevant provisions of POPI regarding transborder information flows; and
 - 3.6. not retain any Personal Information for longer than is necessary for achieving the purpose in terms of bid or in fulfilment of any other lawful requirement.
4. ECIC will ensure that all reasonable measures are taken to:
 - 4.1. identify reasonably foreseeable internal and external risks to the Personal Information in its possession or under its control;
 - 4.2. establish and maintain appropriate security safeguards against the identified

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- risks;
 - 4.3. regularly verify that the security safeguards are effectively implemented;
 - 4.4. ensure that the security safeguards are continually updated in response to new risks or deficiencies in previously implemented safeguards;
 - 4.5. provide immediate notification to the Bidder if a breach in information security or any other applicable security safeguard occurs; provide immediate notification to the Bidder where there are reasonable grounds to believe that the Personal Information has been accessed or acquired by any unauthorised person;
 - 4.6. remedy any breach of a security safeguard in the shortest reasonable time and provide the Bidder with the details of the breach and, if applicable, the reasonable measures implemented to address the security safeguard breach;
 - 4.7. provide immediate notification to the Bidder where the Bidder has, or reasonably suspects that, Personal Information has been processed outside of the purpose agreed to or consented to;
 - 4.8. provide the Bidder, upon request, with all information of any nature whatsoever relating to the processing of the Personal Information for the purpose of the bid and any applicable law; and
 - 4.9. notify the Bidder, if lawful, of receipt of any request for access to Personal Information, in its possession and relating to the Bidder.
5. The Bidder has the right to inspect the Personal Information processing operations, as well as the technical and organisational information security measures employed by the ECIC to ensure compliance with the provisions of this Annexure.

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Annexure C: Applicable Standard Bidding Documents

SBD 1

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE EXPORT CREDIT INSURANCE CORPORATION OF SOUTH AFRICA					
BID NUMBER:	ECIC04P-2025/26		CLOSING DATE:	27 JANUARY 2026	CLOSING TIME: 11:00
DESCRIPTION	PROVISION OF SHORT-TERM INSURANCE BROKERAGE SERVICES FOR FIVE YEARS				
BID RESPONSE DOCUMENTS MUST BE SENT TO THE FOLLOWING EMAIL ADDRESS:					
Preferably via email: procurement@ecic.co.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Lulama Makwela		CONTACT PERSON	Lulama Makwela	
E-MAIL ADDRESS	procurement@ecic.co.za		E-MAIL ADDRESS	procurement@ecic.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELL PHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES	☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				☐ YES	☐ 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.					

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PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
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.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
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.
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.”

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:

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SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

- 1.1. 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.
- 1.2. 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 interest ² 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

² 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.

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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:

Full Name (Name of person employed by Export Credit Corporation of South Africa (SOC) Ltd, the procuring institution)	Relationship

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:

Name of Related Enterprise	Registration (ID) Number

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3. DECLARATION

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

- 3.1. I have read and 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 consortium³ 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.
- 3.5. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6. There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of 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.

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

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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.

Name of declarer			
Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	

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:

1.1.1 the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

1.1.2 the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state
(delete whichever is not applicable for this tender).

~~1.2.1 The applicable preference point system for this tender is the 90/10 preference point system.~~

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

~~1.2.3 Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.~~

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

1.3.1 Price; and

1.3.2 Specific Goals.

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1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80.00
SPECIFIC GOALS	20.00
TOTAL POINTS FOR PRICE AND SPECIFIC GOALS	100.00

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

2.1 **“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;

2.2 **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

2.3 **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

2.4 **“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

2.5 **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

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3 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1 POINTS AWARDED FOR PRICE

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

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

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

Where

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

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

~~3.2.1 POINTS AWARDED FOR PRICE~~

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

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

~~Where~~

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer) (Select or tick or indicate or place a mark in one block only)
B-BBEE Procurement Recognition Level of 135% and at least 50.1% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	20	
B-BBEE Procurement Recognition Level of at least 110% and at least 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	10	
B-BBEE Procurement Recognition Level of at least 110% and up to 30% ownership by (or combination thereof): a. Black people, or b. Black female, or c. Black Designated Group, or d. Black Voting Rights.	5	
Any other B-BBEE Procurement Recognition Level up to 110%.	0	

[BIDDERS ARE REQUIRED TO INDICATE, IN ONE BLOCK, THE NUMBER OF POINTS THEY ARE CLAIMING FOR SPECIFIC GOALS IN THE TABLE IN PAGE 33 (PARAGRAPH

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4.1). IN THE EVENT WHERE A BIDDER MAKES A MARK (ONE MARK), ECIC WILL CONSIDER THE CORRESPONDING POINTS TO BE THE ONE WHICH THE BIDDER IS CLAIMING FOR. WHERE A BIDDER MAKES MULTIPLE MARKS OR DOES NOT MAKE ANY MARK OR INDICATION AT ALL IN THE TABLE, THE BIDDER WILL BE ALLOCATED ZERO (0) POINTS FOR SPECIFIC GOALS, NOTWITHSTANDING EVIDENCE PROVIDED.]

4.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

4.2.1 an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

4.2.2 any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

DECLARATION WITH REGARD TO COMPANY/FIRM

NAME OF COMPANY/FIRM			
COMPANY REGISTRATION NUMBER (ID NUMBER)			
TYPE OF COMPANY/ FIRM [TICK APPLICABLE BOX]			
Partnership/Joint Venture / Consortium	☐	Personal Liability Company	☐
One-person business/sole proprietor	☐	(Pty) Limited	☐
Close corporation	☐	Non-Profit Company	☐
Public Company	☐	State Owned Company	☐

4.3 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:

4.4 The information furnished is true and correct;

4.4.1 The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

4.4.2 In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary

REQUEST FOR PROPOSAL: SHORT-TERM INSURANCE BROKERAGE SERVICES FOR FIVE YEARS

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proof to the satisfaction of the organ of state that the claims are correct;

4.4.3 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 –

4.4.3.1 disqualify the person from the tendering process;

4.4.3.2 recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

4.4.3.3 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;

4.4.3.4 recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

4.4.3.5 forward the matter for criminal prosecution, if deemed necessary.

SIGNATURE(S) OF TENDERER(S)	
NAME AND SURNAME (AUTHORISED SIGNATORY)	
SIGNATURE	
ADDRESS	
DATE OF SIGNATURE	

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Checklist

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/NO
1.	SBD 1	Invitation to Bid	Is the form duly completed and signed?	
2.	SBD 4	Declaration of Interest	Is the form duly completed and signed?	
3.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly completed, Specific Goals points claimed, and the form signed? Refer to the table on page 33, paragraph 4.1.	
4.	B-BBEE status level verification certificate or Sworn Affidavit		Is proof of the B-BBEE Status level of contributor attached? Bidder must attach a copy of B-BBEE Certificate or a copy of a Sworn Affidavit, whichever is applicable.	
5.	Proof of authorisation by the FSCA.		Has the bidder attached a copy of the FSP License or provided their FSP number?	
6.	CSD Report or MAAA Number			
7.	Tender submission (if the bidder is submitting physical information/ documents)		Two (2) printed copies (one original and one copy) submitted? (if submitting physical copies)	
			One (1) electronic copy submitted?	

I, the undersigned (name) certify that the information furnished on this checklist is true and correct.

Position/Title of declarer			
Name of bidder			
Signature of declarer		Date of signature	