INVITATION TO TENDER
APPOINTMENT OF THE SERVICE PROVIDER FOR INSURANCE BROKERING SERVICES FOR THE COEGA DEVELOPMENT CORPORATION (PTY) LTD
CONTRACT NO: CDC/343/26

The Coega Development Corporation is headquartered in the City of Gqeberha, Nelson Mandela Bay Municipality, South Africa, with a strategic operational footprint in South Africa and beyond the borders on the African continent. Coega's vision is to be the leading catalyst for the championing of socio-economic development. This it seeks to achieve through the development and operation of the 9 003-hectare Coega Special Economic Zone (SEZ), a transshipment hub and a leading investment destination in Africa, providing highly skilled competence and capacity for the execution of complex infrastructure and related projects throughout South Africa and selected markets on the African continent, and advisory on the development of industrialisation and logistics zones. Coega's advanced capabilities are successful enablers in sustainable economic zone development and management, real assets management, infrastructure planning and development, technology integration while realising related socio-economic impact areas such as skills and SMME development. Coega's high-performance ethos is grounded in its commitment to sustainable development, the protection of its people and the planet, and the delivery of infrastructure solutions that support a just social and economic transition to a low-carbon, resource efficient, and climate resilient future. The foundational culture of Coega's approach, backed by its core values, is innovation and continuous improvement.

The Finance Business Unit of the CDC provides finance and accounting services to the entire CDC business, including managing the provisioning of Insurance Brokering Services.

INVITATION TO TENDER

The Coega Development Corporation (CDC) is inviting capable and competent Financial Service Providers who are registered with financial services Board, with proven experience and track record to submit their proposal for the provision of Insurance Brokering Services for a 5 years (60 months).

SCOPE OF WORK

The below is intended to illustrate the typical scope of services required; Providing professional advice on short term insurable risks.

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

2.1 Reporting

The following monthly reports should be provided:

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

2.2 Meetings

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

2.3 Advice to CDC

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

CONDITIONS OF TENDER

a) Respondents must comply with the CDC's Procurement Policy & Procedures.
b) The following legislation shall apply:
   i) Public Finance Management Act (PFMA) (Act No. 1 of 1999);
   ii) Preferential Procurement Policy Framework Act (PPPFA), 2000;
   iii) The Preferential Procurement Regulations 2022.
   iv) National Treasury Regulations.
   v) Occupational Health and Safety Act and Regulations Act (Act No. 85 of 1993);
   vi) Compensation for Occupational injuries and disease Act (Act No.130 of 1993);
   vii) Disaster Management Act (Act No. 57 of 2002);
   viii) National Environmental Management Act (Act No. 107 of 1998)
   ix) Board-Based Black Economic Empowerment (BBBEE) Act (Act No. 53 of 2003), as amended by Act No. 46 of 2013);
   x) Competition Act (Act No. 89 of 1998);
   xi) Financial Advisory and Intermediary Services Act, 2002 (Act 37 of 2002).
   xii) The National Archives and Records Service of South Africa Act (Act No. 43 of 16);
   xiii) Protection of Personal Information Act (Act No. 4 of 2013); and
   xiv) Any other applicable legislation.
c) As per financial sector code, generic entities as well as Qualifying Small Enterprises (QSE) with less than 51% black shareholding are to submit a valid SANAS Accredited B-BBEE Verification Certificate. All Exempted Micro Enterprises (EME) and Qualifying Small Enterprises (QSE) with more than 51% black shareholding are to submit a sworn affidavit stamped and signed by the Commissioner of Oaths as per the DTI B-BBEE template
d) Proof of registration with Treasury's Centralized Supplier Database (CSD) or provide a Treasury CSD registration number e.g. MAAAO...
e) The successful bidder will be required to comply with the Occupational Health and Safety Act and Regulations, Act (85 of 1993); Compensation for Occupational Injuries and Disease Act, Act (130 of 1993); Disaster Management Act, Act (57 of 2002) and, all relevant legislations throughout the duration of the contract.
f) The successful bidder will be required to comply with the Occupational Health and Safety Act and Regulations, Act (85 of 1993); Compensation for Occupational Injuries and Disease Act, Act (130 of 1993); Disaster Management Act, Act (57 of 2002) and, all relevant legislations throughout the duration of the contract.
g) The CDC will only award the tender to a bidder who is tax compliant. The tax compliance status of the bidders will be verified through CSD and South African Revenue Services (SARS) website. Prospective bidders must ensure that they are Tax Compliant throughout the validity period of the bid in review.
h) Bidders must be Value Added Tax (VAT) registered and bids must be submitted VAT inclusive. Non-VAT vendors who submit bids for contracts that would, if successful, take their annual turnover above the threshold of R 1 million are obliged to include VAT in the prices quoted and must therefore immediately upon award of the contract register with the SARS as VAT vendors. The award of contract would be conditional pending the successful Bidder submitting proof of registration as a VAT vendor with SARS.
i) The CDC will not award more than five (5) active projects to one bidder, unless one project has reached 80% completion stage and beyond. Capacity assessment may be conducted in an event that the recommended Bidder is the only responsive service provider and has already been awarded five contracts.
j) Bidders must complete and sign the POPI Act Consent Form.
k) Public servants are prohibited from doing any form of business with organs of state, whether in their own capacity as individuals or through companies in which they are directors. Verification will be done, and Bidders will be disqualified should they be found to be in contravention with the Regulations.
l) It is incumbent upon and the responsibility of the Prospective Bidders to submit their full and correct contact details when they download the Request for Proposal (RFP) Document to enable any communication that the CDC might need to issue to all the Prospective Bidders during the bidding process to be realized. The CDC will not be accountable for any such omission or failure by the Prospective Bidders.
m) The appointment will be for 5 years (60 months).
n) Joint Venture & Consortiums will not be accepted due to the nature of services that require a single entity appointment.
o) Bidders will be evaluated on functionality and are expected to meet the minimum of 65% threshold in order to be evaluated further. The evaluation criteria for assessing functionality and weight of each criterion are provided under Section 3.2 Table 3A & 3B of the RFP document.
p) The 80/20 preference point system, will be applicable for allocating points for price and points for specific goals. The following scores will be applicable:
   i) Price - 80
   ii) Specific Goals - 20
q) Successful bidder will be required to provide proof of National (all the South African Provinces) and Gqeberha local presence (established office).
r) The bids will be evaluated as follows:
   i) Stage 1: Responsiveness Assessment,
   ii) Stage 2: Functionality Assessment,
   iii) Stage 3: Quantitative Assessment, and
   iv) Stage 4: Qualitative Assessment.
s) Late Submissions will not be accepted.
t) The tender validity period shall be **twelve (12) weeks** from the RFP closing date.
u) Any misrepresentation of information will lead to immediate disqualification of the Bidder's Submission. It is imperative that the duly authorized person conducts quality control on all the documentation to be submitted to the CDC as part of this RFP and signs the submission as a correct and sound documentation that the CDC could put its reliance on.

The RFP documents will be available for download from the CDC Website (**www.coega.co.za**) and E-tender portal from **24 July 2026** from **10:00**, at no cost. Potential bidders will be required to provide their email addresses in the system before downloading the documentation for correspondence purposes. Potential bidders must therefore ensure that the email addresses are correct. It is the bidder's responsibility to ensure the document is downloaded correctly and submitted as per the original document sequence as CDC will not be responsible for any inconsistencies on the tender document which may lead to the disqualification of the bidder.

A compulsory briefing Meeting will be held on **Friday, 31 July 2026 at 11:00** at the **CDC Head Office, Corner Alcyon Road & Zibuko Street, Zone 1, Coega SEZ, Gqeberha, eNkundleni Boardroom, Ground floor**.

The closing date and time for the receipt of completed bids is **Monday, 24 August 2026 at 12:00** at the **CDC Head Office, Corner Alcyon Road & Zibuko Street, Zone 1, Coega SEZ, Gqeberha**. Bids must be handed in at Document control office at CDC head office Coega Business Center, Cnr Alcyon Rd and Zibuko Street, Zone 1, Coega SEZ, Gqeberha. The lodging register must be completed by the person dropping the tender documents. Bidders using courier services are to ensure that the person dropping the tender documents registers the correct bidding entity name. No late submissions will be considered.

One original completed bid document shall be placed in a sealed envelope clearly marked: "**CDC/343/26: RFP – APPOINTMENT OF THE SERVICE PROVIDER FOR INSURANCE BROKERING SERVICES FOR THE COEGA DEVELOPMENT CORPORATION (PTY) LTD**."

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

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

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

Ms. Zine Mtanda, Unit Head: Supply Chain Management; e-mail address: **tenderscdc34326@coega.co.za**.

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

TIP-OFFS ANONYMOUS HOTLINE:
STOP: THEFT / FRAUD / DISHONESTY / BRIBERY / BLACKMAIL / INTIMIDATION
Call Toll-free TODAY: 0800 007 035 and remain anonymous.

COEGA
▪ right **PLACE** ▪ right **TIME** ▪ right **CHOICE**

ISO 9001:2015 ▪ ISO 14001:2015 ▪ ISO 45001:2018
ISO 20000-1:2018 ▪ ISO 27001:2022