



INVITATION TO BID

BID NUMBER:RFB NO: EFIN/2026/16

BID DESCRIPTION:

**APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION
OF BROKER SERVICES TO THE SHORT-TERM CORPORATE
INSURANCE PORTFOLIO OF ARMSCOR GROUP FOR A PERIOD
OF FIVE (5) YEARS**

EXPECTED TIMEFRAME

BID PROCESS	EXPECTED DATES
Bid Issue Date	25 August 2026
Bid Collection Date	N/A
Briefing Session Date	N/A
Briefing Session Address and Venue	N/A
Bid Closing Date	17 September 2026

TABLE OF CONTENTS

	Number of Pages
RETURNABLE DOCUMENTS CHECKLIST	3
KD 17	14
Tender Data	12
KD18	2
KD21	1
KD22	2
KD24	8
ANNEXURE 1 TO KD24	1
KD25	1
ANNEXURE 1 TO KD25	2
KD26	3
KD27	7

PROPRIETARY INFORMATION

- A-STD-0020: Armscor General Conditions of Contract.
- A-WI-014: Armscor Security Instruction.
- A-GUID-1003: Industry Guide for Defining the Scope of Work.
- AA-GUID-9060: Guide on The Validity of BBBEE Certificate and Affidavits

Bids must ONLY be submitted in hard copy; electronic bids submissions are NOT acceptable.

Kindly register on the National Treasury's Central Supplier Database (CSD) via www.csd.gov.za

RETURNABLE DOCUMENTS CHECKLIST

1. RFB RETURNABLES

1.1 Bidders shall submit the returnable documents together with the Bid on or before the closing time and date of the Bid.

1.2 Administrative documents

1.2.1 Armscor reserves the right to request the administrative returnable documents after the closing time and date in instances where the bidder has not returned the administrative returnable documents. Please note that Armscor is under no obligation to request such documents or information, if information is requested and not provided in terms of legislative requirements.

1.2.2 Bidders must submit the following administrative returnable documents together with the bid.

No.	Administrative Returnable Documents
1	KD17: BID CONDITIONS ACCEPTANCE FORM.
2	Valid proof of BBBEE status for the bidder and its sub-contractor(s).
3	KD 26: BIDDER'S DISCLOSURE.
4	Central Supplier Database Report.

1.2.3 Armscor reserves the right to verify all information submitted with the bid.

Kindly note that any misrepresentations of facts will lead to disqualification of bid and also further steps be taken to claim damages where applicable and undergo a process to list the company and its directors in the list of restricted bidders from doing business with the State with National Treasury,

2. MANDATORY RETURNABLE DOCUMENTS

2.1. Bidders must return the mandatory documents together with the bid. Failure to submit mandatory documents will result in disqualification from further evaluation.

No.	Mandatory Returnable Documents
1	Refer to the Bid specification document.
2	Mandatory Evaluation Documents
3	Functional Evaluation Documents if applicable

3. EVALUATION RETURNABLE DOCUMENTS

- 3.1. Bidders must return the evaluation returnable documents together with the bid. Failure to submit the evaluation returnable documents will result in forfeiting points as provided in the evaluation and may not necessarily result in disqualification from further evaluation.

Bidders are required to develop a returnable schedule annexure in accordance with the following table of contents.

Item	List of Documents Required.	Submitted [Yes or No]	
1.	Central Supplier database (CSD) registration report	Yes ☐	No ☐
2.	SARS issued verification pin code and or proof of application endorsed by SARS. N.B: Armscor reserves a right to verify tax compliance status	Yes ☐	No ☐
3.	Copy of CIPC registration documents listing all members with percentage, see bidding structure for required documents.	Yes ☐	No ☐
4.	Copy of the Joint Venture / Consortium Agreement duly signed by all parties	Yes ☐	No ☐
5.	Copy of the Sub-Contracting Agreement duly signed by all parties	Yes ☐	No ☐
6.	Valid proof of BBEE status for the bidder and its sub-contractor(s)	Yes ☐	No ☐
7.	Designated sectors: Local production and content. (Where applicable) Annexures	Yes ☐	No ☐
8.	Certified copy of Identity Document for the Company representative	Yes ☐	No ☐
9.	Copy of latest audited financial statements or latest management account	Yes ☐	No ☐
10.	Bid conditions acceptance form on KD17	Yes ☐	No ☐

**ARMAMENTS CORPORATION OF SOUTH AFRICA SOC LTD
(ARMSCOR)**

Company registration: 1968/008611/06 Vat registration: 4500101169

RFB NO: EFIN/2026/16

1. INSTRUCTIONS ON SUBMISSION OF BIDS

- 1.1 Bid Closing at **11:00 am on 17 September 2026** (SOUTH AFRICAN TIME)
- 1.2 Bids must be submitted in a sealed envelope(s) marked with bid reference number, bidder name and closing date. Original plus a copy and USB copy
- 1.3 The sealed envelope(s) must be deposited in the bid box at Armscor Head Office, Visitors Entrance (Block) 8 before the bid closing date and time addressed to:

The Manager: Supply Chain Management Department
Armscor SOC Ltd

Postal address: Armscor SOC Ltd
Private Bag X337
Pretoria,
0001

Delivery address: Armscor Head Office
370 Nossob Street
Erasmuskloof Ext 4
Pretoria

- 1.4 Bids dispatched by the courier service company must be marked with bid reference number on the delivery note / packaging and the courier must ensure that the bid document is deposited in the bid box before the closing date and time.

Armscor will not be held responsible for any delays where bid documents are handed to the Armscor Reception or bids that are incorrectly labelled.

- 1.5 Bid proposals received after the closing time and date will not be considered.

2. ENQUIRIES

- 2.1 All queries regarding this bid must be addressed in writing to SCM Department on scmbids@armscor.co.za. Questions/enquiries relating to this RFB should be received five (5) working days prior to the closing date. Queries received after this period will not be considered.

3. BID VALIDITY PERIOD

- 3.1 Bid proposals to remain valid for acceptance for a period of **ONE HUNDRED AND EIGHTY** days counted from the closing date.

NOTE: Bids for the supply of the goods and/or services described in the attached documents are invited in accordance with the provisions of the Armscor General Conditions of Contract (A-STD-0020) as amended, as well as any special condition contained in this document. Copies of the General Conditions of Contract and the Rules of Procedure are available on Armscor's website at www.armscor.co.za.

BID AWARD RESULTS

Result on bid awarding information is not sent to unsuccessful bidders. Particulars of successful bidders are also NOT published on the Armscor Acquisition Bulletin.

BIDDING STRUCTURE

Indicate the type of bidding structure by marking with an 'X' in an appropriate box.	
Individual Bidder	
Joint Venture	
Consortium	
Using Sub-contractors	
Other	

Only fill the relevant category:

If individual bidder, indicate the following:	
Name of Bidder	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Primary email address	
Alternative Email Address	
Postal Address	
Physical Address	
NB: Submit with the bid the following documents:	
Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.	
In case of individual, supply ID document for local and if foreigner supply passport number or identification as applicable in that country.	
Latest copies of all share certificates, in case of a company or any other form of a legal entity.	
Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.	

If Joint Venture or Consortium, indicate the following: (To be completed for each JV/Consortium member)	
Name of Joint Venture / Consortium	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	
NB: Submit with the bid the following documents:	
Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.	
In case of individual, supply ID document for local and if foreigner supply passport number or identification as applicable in that country.	
Latest copies of all share certificates, in case of a company or any other form of a legal entity.	
Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.	

If using subcontractors, indicate the following:	
Name of Prime -Contractor	
Percentage Value to be subcontracted	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier	

Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	
Subcontractor Details:	
Name of Subcontractor	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	
NB: Submit with the bid the following documents for both Prime and Sub-Contractors:	
Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.	
In case of individual, supply ID document for local and if foreigner supply passport number or identification as applicable in that country.	
Latest copies of all share certificates, in case of a company or any other form of a legal entity.	

Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.	
Other:	
Name of Bidder	
Company / Close Corporation Registration Number	
VAT Registration Number	
National Treasury Supplier Number	
Unique Registration Reference Number	
Contact Person	
Telephone Number	
Fax Number	
Email Address	
Postal Address	
Physical Address	
NB: Submit with the bid the following documents:	
Copies of the bidder's CIPC company registration documents listing all members with percentages, in case of a CC.	
In case of individual, supply ID document for local and if foreigner supply passport number or Identification as applicable in that country.	
Latest copies of all share certificates, in case of a company or any other form of a legal entity.	
Shareholding breakdown per race, gender and percentage shareholding with shareholders of the bidding entity.	

Declaration:

I, as the duly authorized representative of the bidder hereby authorize Armscor to request, investigate and process company information including tax compliance via the SARS website.

.....

Name

.....

ID number

BID CONDITIONS ACCEPTANCE FORM

Bidders shall complete and sign this bid conditions acceptance form

I/We hereby offer to supply all or some of the supplies and/or services described in the Pricing Schedule and /or attached documents on the terms and conditions and in accordance with the conditions set out in Armscor's General Conditions of Contract A-STD-0020 as amended (and I/we acknowledge that I/we am/are acquainted therewith) at the price and on the terms of delivery/execution inserted by me/us.

I/We agree -

1. that this bid shall remain binding on me/us and open for acceptance for the period stipulated above;
2. that if my/our bids is accepted, the acceptance will be communicated to me/us by letter or order through the post, and such acceptance shall constitute a contract between me/us and Armscor, subject to the terms and conditions set out in Armscor's General Conditions of Contract (A-STD-0020), as amended, the contents of which I/we acknowledge ourselves to be acquainted with.

I further acknowledge the following conditions:

- a) Armscor will not award the bid or order to any bidder based on the proven poor record or poor performance of the bidder in previous projects within the Armscor.
- b) Armscor will not award order or contract to the bidders who are blacklisted or restricted or have committed other acts of fraud and misrepresentation of facts e.g., tax compliance, company financials, etc. will be eliminated from the bid process.
- c) Armscor will not award order or contract to the bidders who failed to demonstrate capacity or capability to perform the order/contract.
- d) Armscor reserve the right not to award this quotation to any bidder who fails the financial stability assessment.
- e) Armscor reserves the right to award the bid in part or in full.
- f) Armscor reserves the right to disregard bids that are abnormally low prices compared to the market.
- g) Armscor reserves the right not to award order or contract to the bidder/s that might cause reputational harm to the entity.
- h) Armscor reserves the right not to award order or contract in circumstances where the relevant vendor has employed, or is directed by, anyone who was previously employed in the service of the state where the person is or was negatively implicated in any SCM irregularity.

I/We choose as domicilium citandi et executandi in the Republic

.....

.....
(no post box or private bag)

IN BLOCK LETTERS ON BEHALF OF -

Complete registered:

Name of bidder:

AUTHORISED SIGNATURE

.....
Signature

.....
Date

.....
Name in block letters

.....
Capacity

SUPPLIER REGISTRATION

- 1.1 Bidders must register on the National Treasury Central Supplier Database (CSD) in terms of National Treasury Instruction Note 3 of 2016/17.
- 1.2. Bidders must electronically register for Security on Armscor website to be considered for orders which are administered by Armscor SOC Ltd on Behalf of clients.

For more information on security registration contact: -

The Security Registration

Private Bag X337

PRETORIA

0001

E-mail: - register@armscor.co.za

ALL BIDDERS SHALL COMPLY WITH THE FOLLOWING:

1. The pages of the KD17 document are numbered from one, and the final page bears the words "and last". Bidders should check the numbers of the pages as no liability arising from claims owing to the omission or duplication of pages will be recognised by Armscor. The appendices mentioned in these pages form part of the bids.
2. **All bidders shall -**
 - 2.1. insert their name at the top of each price schedule form used (a rubber stamp may be used);
 - 2.2. insert the information in the spaces provided in the price schedules by writing or typing on the dotted lines only (additional information should be contained in a separate annexure);
 - 2.3. if they wish to make more than one bid against an item, as an alternative, apply for additional copies of the bid documents or photocopy one or more pages, and not retype or redraft any of the forms used;
 - 2.4. indicate the prices quoted in the units shown and quote them per item;
 - 2.5. indicate in respect of each item whether the goods/services quoted comply strictly with the specified requirements, and furnish particulars of deviations if this is not so;
 - 2.6. complete all appendices.
3. **Value-added tax, customs duties, ad valorem customs duties and surcharges**
 - 3.1. Value added tax levied by the Receiver of Revenue must not be included in the prices quoted but be shown as a separate line item.

- 3.2. Where supplies are quoted which are subject to levying of any customs duty, ad valorem customs or excise duty or surcharge by the Department of Customs and Excise, such charges must not be included by the bidder in the prices quoted. The applicable customs duty, ad valorem customs or excise duty or surcharge must, however, be indicated separately where provided for on Armscor's Questionnaire (KD18).

4. Security

- 4.1. Classified bids are to be handled in the manner set out in Armscor's Security Instruction, document number A-WI-014, copies of which are obtainable on request from the Contractor Security Section, P O Box 411, Pretoria, 0001.
- 4.2. Attention is drawn particularly to the procedure set out in chapter 4 of the manual, which is to be complied with when forwarding classified documents.

5. Advance payments

Bidders shall furnish the price without advance payment.

6. Performance Guarantee

Armscor reserves the right to request the successful bidders to submit a performance guarantee for the proposed contract. Bidders must submit prices without provision for the performance guarantee as well as prices including the cost of such a guarantee.

7. Commissions

If any commission is payable by yourself to any person(s) or body as a result of any order which may arise from this Request for Proposal, you must submit full details of the applicable person(s) or body and the amount payable, with these bids.

8. Compliance with Arms Control and Non-Proliferation requirements

Any bidder responding to this Request for Proposal (RFP) shall comply with the following when dealing with defence matériel:

- 8.1 All relevant South African legislation, including, but not restricted to, the following:
- a) National Conventional Arms Control Act, Act No. 41 of 2002, and its implementing Regulations; and
 - b) Non-proliferation of Weapons of Mass Destruction Act, Act No. 87 of 1993, as amended, and its implementing Regulations.
- 8.2 Defence export legislation of supplier countries, i.e. countries from which defence matériel is exported to South Africa as well as countries of origin of the matériel.
- 8.3 It is the responsibility of the bidder to, when applicable, register with the Directorate Conventional Arms Control (DCAC), Defence Secretariat, in terms of section 13 of the National Conventional Arms Control Act and with the South African Council for the Non-Proliferation of Weapons of Mass Destruction Act.
- 8.4 If a contract with Armscor is being entered into, the Contractor shall comply with arms control and non-proliferation requirements as prescribed by the contract-

9. **Submission of a NCACC Permit**

9.1 In terms of the National Conventional Arms Control Act (Act No 41 of 2002, Chapter II, section 13), no person may trade in conventional arms, unless that person is:

- a) Registered with the National Conventional Arms Control Committee (NCACC).
- b) Is in possession of a permit authorised by the NCACC and issued by the Directorate Conventional Arms Control (DCAC).

NOTE: Local bidders who trade in Conventional Arms as set out above are required to submit a certified copy of a valid NCACC permit when submitting a bid.

10. **Tax Compliance**

The conditions detailed in the Instruction for Application for Tax Compliance (KD 25) must be adhered to. Armscor Suppliers /Bidders must remain tax compliant for the duration of their contracts.

11. **Defence Industrial Participation and National Industrial Participation**

11.1 The DIP value threshold of foreign content is based on:

Any single agreement of which the foreign content exceeds USD 2 million; Multiple main agreements concluded within two years of each other, within the framework of a specific project or across different projects, for same and or similar products or services, awarded to the same Seller of which the aggregate value of the foreign content exceeds USD 2 million; Extensions or amendments to the main agreement within the active life of the agreement, which result in the aggregate foreign content value of the project exceeding USD 2 million; Where multiple suppliers are used to address a single Defence Acquisition for the same products or services and the value of the foreign content, in total, exceeds USD 2 million, each supplier shall incur pro rata 50% of the total DIP obligation.

11.2 Where a contract to the value of the equivalent of USD10 000 000 or more, is placed on a foreign company, a minimum of 30 % National Industrial Participation (NIP) shall be part of the foreign company's contractual obligations, in addition to the 50 % DIP. This condition is also applicable to all contracts placed on a local company, subcontracting a single foreign company to the aforesaid value or more.

12. **Local production and content for designated sectors**

12.1 Local Content and Production refers to the mandate where a minimum percentage of goods, services or inputs be locally sourced and manufactured within South Africa to boost the local economy.

12.2 A bidder awarded a contract in relation to a designated sector, may not subcontract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.

- 12.3 If there is no designated sector, Armscor may include as a specific condition of the bid, that only locally produced services or goods or locally manufactured goods with a stipulated minimum threshold for local production and content, will be considered.

13. Awarding of Bids

The awarding of bids will be in terms of the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022 and Preference Point System of the Preferential Procurement Regulations, 2022.

The applicable points are:

Price (Pp):	80 Points
Specific Goals:	20 Points
Total:	100 Points

The following formula must be used to calculate the points in respect of a bid up to a rand value of R 50 000 000, 00 (all applicable taxes included).

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

80/20

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

Where:

P_s = Points scored for price of bid under consideration.

P_t = Price of bid under consideration.

P_{min} = Price of lowest acceptable bid.

14. Objective Criteria

Armscor reserves the right to:

- Armscor will not award the bid or order to any bidder based on the proven poor record or poor performance of the bidder in previous projects within the Armscor.
- Armscor will not award order or contract to the bidders who are blacklisted or restricted or have committed other acts of fraud and misrepresentation of facts e.g., tax compliance, company financials, etc. will be eliminated from the bid process.
- Armscor will not award order or contract to the bidders who failed to demonstrate capacity or capability to perform the order/contract.
- Armscor reserve the right not to award this quotation to any bidder who fails the financial stability assessment.
- Armscor reserves the right to award the bid in part or in full.
- Armscor reserves the right to disregard bids that are abnormally low prices compared to the market.

- g) Armscor reserves the right to disregard bids that are abnormally high prices compared to the market.
- h) Armscor reserves the right not to award order or contract to the bidder/s that might cause reputational harm to the entity.
- i) Armscor reserves the right not to award order or contract in circumstances where the relevant vendor has employed, or is directed by, anyone who was previously employed in the service of the state where the person is or was negatively implicated in any SCM irregularity.

Should Bidder(s) be selected for further negotiations, they will be chosen on the basis of the greatest benefit to Armscor and not necessarily on the basis of the lowest costs.

KD17

BID NUMBER

: EFIN/2026/16

CLOSING AT 11:00 ON

: 17 September 2026

VALIDITY PERIOD: 180 DAYS

NAME OF BIDDER

:

Item	Description	Quantity	Unit Price	Total Price
1	Insurance Broker Services – Year 1	1		
2	Insurance Broker Services – Year 2	1		
3	Insurance Broker Services – Year 3	1		
4	Insurance Broker Services – Year 4	1		
5	Insurance Broker Services – Year 5	1		
TOTAL EXCLUDING VAT				
VAT				
TOTAL INCLUDING VAT				

Specific goal: Table 3 :General procurement

1. Delivery address: [Armcor Head Office ,370 Nossob Street, Erasmus-Kloof, Pretoria](#)
2. **SUBMISSION OF BID DOCUMENT**
 - a. Bidders are required to submit neat, bounded and clearly labelled documents, below address:
Armcor Head Office ,370 Nossob Street, Erasmus-Kloof, Pretoria
 - b. Bid documents shall be submitted in a sealed envelope /or package clearly marked with the bid reference number as per the bid advert, bidder company name and be deposited in the tender box on the address as stated above.
3. * Period required for commencement of delivery, after receipt of order:.....
4. * Rate of delivery:
5. * Period required for completion of order, after receipt thereof:.....
- * Must be completed by Bidder if not completed by Armcor



TENDER DATA:

Tender for the appointment of a service provider for the provision of broker services to the short-term corporate insurance portfolio of the Armscor Group for a period of five (5) years.

ANNEXURE A: BID SPECIFICATION AND EVALUATION PROCESS

1. INTRODUCTION

This document formally details the specifications including the evaluation criteria to be used for the appointment of a service provider for the provision of broker services to the short-term corporate insurance portfolio of the Armscor Group for a period of five (5) years.

2. BID SPECIFICATION

2.1 Background of business need

The insurance and risk management policies adopted by the Armscor group are aimed at obtaining the optimum balance between insurance and self-retention at the minimum cost to protect its asset base, earning capacity and legal obligations against unexpected losses. All fixed assets are insured at current replacement value. Risks of a possible catastrophic nature are identified and insured while acceptable risks of a non-catastrophic nature are self-insured. Self-insurance has been instituted where the cost-to-benefit relationship exceeds the risk and the incidence of losses is of a minor nature. Self-insured risks are reviewed annually to ensure cover is adequate.

The following policies are included under the Armscor Insurance portfolio:

REF	POLICY	INSURED VALUE 2026/27 R
1	Assets All Risks (Property damage and Business Interruption)	7 802 459 482
2	Fidelity Guarantee	
2.1	Commercial Crime	30 000 000
2.2	Trustee Fidelity/Negligence (Medical Benefit Fund/ Provident Fund & Pension Fund)	13 000 000
3	Liabilities	
3.1	General Primary Liability	5 000 000
3.2	Umbrella Liability (in excess of primary)	345 000 000
3.3	Ship Repairers	245 000 000
3.4	Professional Indemnity	150 000 000
3.5	Airstrip Liability	60 000 000
3.6	Directors & Officers Liability:	100 000 000
3.7	Gradual Pollution	20 000 000
3.8	Freight Forwarders	20 000 000
3.9	Pollution Liability and Clean Up Costs - Mobility	10 000 000
4	Stated Benefits	
4.1	Group Personal Accident and HIV Occupational Risks Benefits	1 118 536 095
5	Motor Fleet	
5.1	Armscor owned vehicles	Retail value

5.2	Motor Traders (vehicles at Gerotek in Care/custody & control)	As declared
5.3	Rental vehicles	Estimated rental days 5 390 and 200 days for high value vehicles
5.4	Motor Fleet – Ad Hoc Vehicles	As declared
6	International Business Travel Insurance	340 travel days
7	Contractors All Risk	23 000 000
8	Marine small craft	21 875 000
9	Plant All Risks (Mobile cranes)	48 118 702
10	Plant All Risks (Scientific Research equipment)	46 947 298
11	Contingency Risks	10 000 000
12	Cyber Liability	50 000 000
13	SASRIA & Riot Wrap	500 000 000

Table 1: Armscor's insurance portfolio

3. TECHNICAL AND/OR FUNCTIONAL SPECIFICATION

3.1 The organisation requires the appointment of a qualified and independent insurance broker to provide professional insurance and advisory and brokerage services. The appointed broker shall:

- Assess and identify the organisations insurable risks.
- Provide objective advice on appropriate insurance solutions and coverage levels.
- Obtain and compare quotations from reputable insurers.
- Negotiate favourable policy terms, conditions and premium on behalf of the organisation.
- Provide claims management and support services, including submission and follow up of claims.
- Ensure compliance with applicable insurance regulations and industry standards

3.2 The broker must be appropriately licensed, experienced and capable of delivering ongoing risks management and insurance support services to the organisation.

4.SCOPE OF WORK

Phase	Deliverable Acceptance
Service program	The broker is required to coordinate a service program with dates of all major meetings for the new period of insurance to be provided by the second week of April of a specific year. The program must include the following: • Pre and Post renewal meeting. • Renewal meeting. • Uninsured risks discussion. • Recovery negotiations on old claims • Review and assess Armscor's level of liability cover, indemnity and adequacy of cover. • Provide assistance and advice in respect of insurance matters of technical nature.

Phase	Deliverable Acceptance
Renewal program	• Broking information required for renewal must be provided to Armscor by the end of October annually. • Final renewal terms and fee structure to be presented on or before the 10th working day in March on an annual basis, unless otherwise agreed upon by both parties. • The program will include visits to off-site divisions at least once every 12 months to discuss insurance detail and uninsurable risks. • All policies to be provided within two months after renewal.
Monthly meetings	• Monthly face to face meetings between the broker and Armscor • Minutes of all meetings to be provided within 10 working days after the date of the meeting. • Submit monthly reports within 10 working days after the meeting date of all reported claims and added policies and/or re-insurance taken for the period.
Responsibility of insurance broker	• The lead broker is required to take full responsibility and accountability for equity partners if applicable. • The broker is required to allocate the relevant resources to the Armscor portfolio, including: • Claims handling; • Underwriting; • Account handlers; • Risk Managers
Resources	The lead broker or person responsible for handling Armscor's account shall have Key Individual (KI) and shall have a South African citizenship (the Key Individual (KI) with dual citizenship will not be acceptable).
Security Clearance	• The Key Individual responsible for handling Armscor's account must obtain and maintain the required Security Clearance level (confidential/secret or as determined by Armscor), as per Armscor Security Instruction (A-WI-014) and Armscor Condition of Contract (A- STD-0020). If the KI cannot obtain or retain the required security clearance, the broker shall immediately remove the KI concerned from the premises. Armscor will have no liability towards the broker, their employees or subcontractors and will compensate the broker only for services provided up until the moment the broker is notified of the security deviation. • Armscor's division responsible for security clearances will handle all security clearances and the costs of the first clearances will be paid by Armscor. The broker is responsible for the cost of the security clearances of any replacements. • The said process will include the Vetting of Company Directors and all employees who will be deployed at Armscor premises for the duration of the Project • The broker must ensure that the KI is issued with a preliminary security clearance by Armscor's Personnel Evaluation Division (APED) before they are allowed onto the Armscor site. • The remaining resources allocated to the Armscor account will be required to sign a Non-Disclosure Agreement. Any new people allocated to Armscor's account

Phase	Deliverable Acceptance
	can only be made after confirmation with the Senior Manager: Financial Accounting. If confirmation is given, Armscor accepts no liability with respect to the outcome of the security clearance.
Minimum Insurance system functionalities	Electronic claims management • Monthly reports on claims status • Placements reports • Quarterly reports detailing the completed work • Consolidate the insurance renewal information Required to provide a quarterly detailed analysis of all claims paid and status of outstanding claims.
Risk Management Services	• Assist Armscor with all aspects pertaining to risk assessment and mitigation within the short-term insurance environment. • Assist Armscor with its risk management program so as to minimize the risk of legal liability and reduce premium costs.
Legislation	• Keep Armscor up to date with the latest amendments to the Legislation on Insurance. • Broker is required to comply with the Promotion of Access to Information Act (PAIA) and the Protection of personal information Act (POPI).
Invoicing	Renewal and adjustment • Submitted within 10 working days after renewal. • Detailed premium computation to be attached to each invoice. • Other invoices • To be submitted within 30 days after inception of cover. Detailed premium computation to be attached to each invoice.
Claims	• Visit any site where an insurable incident has occurred within 24 hours of being notified. • Assessors to be appointed within 2 working days from date of reporting on a claim. • Current claims statistics report to be provided to Armscor on a monthly basis within 7 working days after the end of the month. Feedback/Response on claims submitted to be received within 5 working days.
Training	The broker is required to provide training of the staff in relation to the industry legislation and updates as well as insurance covers that Armscor requires training on.
Local and International Insurers	The broker is required to have links with local and international insurer for specialized cover needed by Armscor.

5. BID EVALUATION PROCESS

Each received bid will be evaluated in 3 stages below. A bid that does not comply with the requirements of **stage 1 and stage 2** will be eliminated from the evaluation process.

STAGE 1	Mandatory Criteria
STAGE 2	Functionality criteria
STAGE 3	Price and Specific goals (80/20 preference point system)

5.1 STAGE 1: Mandatory criteria

Failure by the bid to meet any of the **Mandatory Criteria** stated below will lead to disqualification and the bid will not be evaluated further to stage 2 .

No	Criteria	Description	Documentary Proof Required
1	Registration with the Financial Sector Conduct Authority (FSCA)	The bidder and/or the sub-contractor shall be registered with the Financial Sector Conduct Authority (FSCA) as a Financial Advisory Intermediate Services (FAIS).	The bidder and/or the sub-contractor shall submit with the bid a copy of a valid Financial Advisory Intermediate Services (FAIS) license of the bidder and/or the sub-contractor issued by the Financial Services Conduct Authority.
2	Professional indemnity insurance	The bidder and/or the sub-contractor shall have professional indemnity insurance of at least R250 million for the bidder or total combined.	The bidder and/or the sub-contractor shall submit with the bid proof of current professional indemnity insurance of a total combined of at least R250 million OR a letter of intent from the insurer stating that the cover will be issued upon award as the preferred bidder. The letters of intent must be on the insurer's letterhead signed and dated by a duly authorised official

No	Criteria	Description	Documentary Proof Required
3	Commercial crime insurance	The bidder and/or the sub-contractor shall have commercial crime insurance (not fidelity insurance) of at least R50 million for the bidder or total combined.	The bidder and/or the sub-contractor shall submit with the bid proof of current commercial crime insurance of a total combined of at least R50 million OR a letter of intent from the insurer stating that the cover will be issued upon award as the preferred bidder. The letters of intent must be on the insurer's letterhead signed and dated by a duly authorised official.
4	Company Resources	The bidder and/or the sub-contractor shall allocate five resources of which one must be a Key Individual (KI) and one must be a Representative individual (RI) .	The bidder and/or the sub-contractor shall submit with the bid copies of qualifications: Regulatory Examination Certificate (RE1) for the allocated Key Individual (KI) and Regulatory Examination Certificate (RE5) for the allocated Representative Individual (RI).
5	Short-term commercial insurance experience of the Company	The bidder and/or the sub-contractor shall have short-term commercial insurance experience of at least 3 years within the last 5 years in all required insurance covers that are detailed in the RFB (table 1 of the Armscor insurance portfolio). NB: The experience could be attained at separate organisations. Multiple letters can be submitted to cover the full Armscor insurance portfolio.	The bidder and/or the sub-contractor shall submit signed reference letter(s) from contactable clients where such insurance covers were provided. The reference letters must be on the client's letterhead and signed by a duly authorised official.

5.2 STAGE 2: Functional Evaluation Criteria (PAPER BASED EVALUATION)

The bidder shall achieve a minimum qualifying score (MQS) of 65% or more to be evaluated further, failure to achieve the MQS will result in the disqualification of the bid and the bidder will not be evaluated further.

Functional Criteria	Evidence required	Scoring System		
1. Solvency Ratio: Total Debt / Equity	The bidder and/or the sub-contractor shall submit with the bid Audited or Independently reviewed most recent financial statements	Ratio		Score
		Below 1.5		15
		1.5		10
		Above 1.5		5
		No submission		0
2. Solvency Ratio: Optimum debt/equity structure of 60% liabilities to equity	The bidder and/or the sub-contractor shall submit with the bid Audited or Independently reviewed most recent financial statements	Ratio		Score
		Below 60%		15
		60%		10
		Above 60%		5
		No submission		0
3. Liquidity Ratio: Current Ratio	The bidder and/or the sub-contractor shall submit with the bid Audited or Independently reviewed most recent financial statements	Ratio		Score
		Above 2		15
		2		10
		Below 2		5
		No submission		0
4. Liquidity Ratio: Cash Ratio	The bidder and/or the sub-contractor shall submit with the bid Audited or Independently reviewed most recent financial statements	Ratio		Score
		Above 0.2		15
		0.2		10
		Below 0.2		5
		No submission		0

5. Financial Score	The bidder and/or the sub-contractor shall submit with the bid Audited or Independently reviewed most recent financial statements	Rating Score	Score
		80 - 100	15
		60 – 79	10
		51 - 69	5
		Below 50/no submission	0
6. Experience of the Company The bidder and/or the sub-contractor shall have at least 5 years'(combined) experience in commercial insurance broker industry	The bidder and/or the sub-contractor shall submit with the bid a company profile which details all the experience acquired in the commercial insurance industry.	Rating Score	Score
		Between 11 – 15 years	25
		Between 7 – 10 Years	15
		Between 5 – 6 Years	10
		Below 4 years /no submission	0
Total		The maximum total score: 100% The minimum qualifying score: 65%	

5.2.1 The bidder shall achieve a **minimum qualifying score (MQS) of 65% or more** to be evaluated further to the next phase.

9.3 STAGE 3: PRICE AND SPECIFIC GOALS

- A bidder who has met the requirements for stage 2 will be evaluated for Price and Specific Goals

9.3.1 PREFERENTIAL PROCUREMENT REGULATION REQUIREMENTS

- Refer Preferential Procurement Policy Framework Act, 2000; Preferential Procurement Regulations, 2022;
- Armscor Preferential Procurement Policy: A-POL-9009, issue 5 dated 01 August 2025

Awarding of Bids

- The awarding of this bid will be in terms of the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022 and Preference Point System of the Preferential Procurement Regulations, 2022.

The applicable points are:

Price (Pp):	80 Points
Specific Goals:	20 Points
Total:	100 Points

The following formula will be used to calculate the points in respect of a bid up to a rand value of R 50 000 000, 00 (all applicable taxes included).

A maximum of 80 points is allocated for price on the following basis: **80/20**

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

Where:

P_s = Points scored for price of bid under consideration.

P_t = Price of bid under consideration.

P_{min} = Price of lowest acceptable bid.

The awarding of this bid will be in terms of the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022

9.3.2 ALLOCATION OF PREFERENCE POINTS FOR SPECIFIC GOALS

The preference points that will be awarded in terms of the specific goals shall be as follows:

Table 3: Specific Goals for Other Procurement

No	Specific Goals for Other Procurement	Points for 80/20 PPS
RDP Programme: Promotion of South African Owned Enterprises		
1	Entities which are BBBEE Level 1	20 points
2	Entities which are BBBEE Level 2	18 points

3	Entities which are BBBEE Level 3	16 points
4	Entities which are BBBEE Level 4	10 points
Total Points Per PPS		20 points

NB: Entities with a BBBEE level 5 and below **will score 0** and not be disqualified from the evaluation process.

Evidence required

- i. The Bidder shall submit with the Bid documents a valid BBBEE certificate (BBBEE certificate issued by a SANAS accredited verification agency), or a valid CIPC BBBEE certificate and or a valid and completed BBBEE Sworn affidavit as a proof of compliance to claim preference points.
- ii. If the Bidder is an unincorporated Joint Venture (JV) or Consortium, the Bidder shall submit with the Bid, a valid consolidated proof of BBBEE status.
- iii. The bid must be accompanied by the CIPC Beneficial Ownership Declaration. The declaration should be the latest lodged with CIPC.
- iv. Should the bidder fail to submit valid proof of BBBEE and CIPC Beneficial ownership declaration, then the bidder shall score no points for Specific Goals.

9.3.3 Verification of bidder's information

- a. Armscor reserves the right to:
- b. Not evaluate and award bids Submissions that do not comply strictly with this RFB document.
- c. Make a selection solely on the information received in the bid and enter into negotiations with one or more of preferred bidder(s) based on the criteria specified in the evaluation of this bid.
- d. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the submitted bid shall be sought, offered or permitted.
- e. Award a contract to one or more bidder(s).
- f. Cancel this bid or any part thereof when necessary.

10 CONTRACT CONDITIONS

These are conditions that addresses the unique needs of the contract, and these must be adhere/met by the recommended bidder.

6.1 Letter of Intent

Where a preferred bidder has submitted a letter of intent, the bidder must subsequently submit a confirmation of cover, on the insurer's letterhead, duly signed and dated by a duly authorised official, within 7 business days of notification.

6.2 Change of Resources

Where a bidder allocates resources during the initial phase (bidding stage) and subsequently changes those resources during the running of the contract the replacement resources must be of the same level as those of the initial nominated resources in terms of qualifications, and these must be submitted to the Contract Manager.

11 SUBMISSION OF BIDS

7.1 Bidders are required to submit neat, sealed envelope /or package clearly marked with the bid reference number as per the bid advert, bidder company name and closing date of the tender to be deposited in the bid box at the below address:

- Armscor Head Office, 370 Nossob Street, Erasmus Kloof Ext 4, Visitors Entrance (Block) 8 on or before the bid closing date and time.

7.2 The bid submission requires a 1 envelope system as per below:

• Bidders are to submit:

- a) 1x original hard copy of the bid.

7.3 Other instructions for submissions of Bids and other documents are stated in the Invitation to Bid document issued/published for this tender.

**ARMAMENTS CORPORATION OF SOUTH AFRICA LTD
(ARMSCOR)**

QUESTIONNAIRE

REPLIES

1. What is the request for bids number?
2. Confirm compliance to price basis.
3. Indicate which of the following applies:
 - 3.1 The prices are fixed. ☐
 - 3.2 The prices are not fixed ☐
4. The delivery period shall be fixed.
5. Are you the accredited agent in the RSA for the manufacturer of the supplies quoted by you? Yes ☐ No ☐

WHERE SUPPLIES OFFERED ARE TO BE IMPORTED OR ARE OFFERED EX BONDED WAREHOUSE, THE ATTACHED SECURITY QUESTIONNAIRE (KD 22) MUST BE COMPLETED AND THE FOLLOWING QUESTIONS ANSWERED:

6. Is a special import permit required?
If not, state your imports permit number.
7. What are the names and addresses of your overseas suppliers? (Give particulars in KD 22)
.....
.....
.....
8. Foreign content:
 - 8.1 What amount in foreign currency must be remitted overseas?
.....
 - 8.2 What is the rate of exchange used in converting the ZAR1,00 =
..... amount into SA Rand and the date on which this is based? DATE:

9. Statutory costs:

9.1 Are the goods quoted on subject to customs duty, ad valorem customs or surcharge?

.....

9.2 If so, what is the amount payable in respect of

a) Customs duty

b) Ad valorem customs duty?

PRICE BREAKDOWN

10. The following particulars must be furnished, failure of which may invalidate the bids.

- 10.1 FOB/FCA cost of item
- 10.2 Sea/Air freight
- 10.3 Insurance charges
- 10.4 Clearance charges
- 10.5 Customs duties
- 10.6 Ad valorem customs duties
- 10.7 Delivery costs from port/airport to your premises
- 10.8 Local content (excluding (10.10))
- 10.9 Delivery costs from your premises into store
- 10.10 Balance (detail to be submitted)
- TOTAL**

Amount	% of Total Price

.....

DATE

.....

BIDDER'S SIGNATURE

**ARMAMENTS CORPORATION OF S.A. LIMITED
(ARMSCOR)**

**PREVIOUS PURCHASES
LAST TWO BIDS**

If any similar or identical equipment has been supplied to ARMSCOR,
or to any of ARMSCOR'S subsidiaries or the South African National Defence Force,
the completion of this form by bidders is compulsory.

Date of Bids	Organization	Order No.	Items Purchased	Unit Price	Motivation for Price Differences

BIDDER:	
SURNAME AND INITIALS:	
DATE:	
SIGNATURE:	

ARMAMENTS CORPORATION OF SOUTH AFRICA LIMITED (ARMSCOR)

SECURITY QUESTIONNAIRE ON THE IMPORTED CONTENT OF BIDS

1. In all cases where the supplies quoted are imported (either in full or in part), bidders shall furnish the following particulars (if space is insufficient, use additional pages):

1.1 COUNTRY OF ORIGIN:

Item No(s).	Country
.....	
.....	
.....	
.....	

1.2 NAME OF MANUFACTURER(S)/SUPPLIER(S)/STOCKIST(S):

Item No(s).	Name
.....	
.....	
.....	
.....	

1.3 NAME OF INTERMEDIARY (IES) (WHEN THERE IS NO DIRECT CONTACT WITH THE FIRMS LISTED IN 1.2):

Item No(s).	Name
.....	
.....	
.....	
.....	

1.4 NAME OF AGENTS RESPONSIBLE FOR SHIPPING AND CLEARANCE:

Item No(s)	Name
.....	
.....	
.....	
.....	

1.5 NAME OF BANK ARRANGING TRANSFER OF FUNDS OVERSEAS:

Item No(s).	Name
.....	
.....	
.....	
.....	

1.6 IS AN END-USER CERTIFICATE REQUIRED? YES ☐ NO ☐

If yes:- Item No. (s).

.....

.....

.....

.....

1.7 ARE THE ITEMS SUBJECT TO ANY SPECIAL EXPORT REQUIREMENTS?

YES ☐NO ☐

If Yes:-

Item No. (s)	Requirements
.....	
.....	
.....	
.....	

2. Failure to furnish the information requested may render the bid invalid.

.....

NAME

.....

DATE

.....

BIDDER'S SIGNATURE

BROAD-BASED BLACK ECONOMIC EMPOWERMENT**ACRONYMS AND ABBREVIATIONS**

B-BBEE	Broad-Based Black Economic Empowerment
CIPC	Companies and Intellectual Property Commission
COTS	Commercial Off-The-Shelf
EME	Exempted Micro Enterprises
MOTS	Military Off-The-Shelf
QSE	Qualifying Small Enterprises
SANAS	South African National Accreditations Systems

1 PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000

1.1 The following preference points will be awarded in terms of the Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022; Armscor Preference Point System of the Preferential Procurement Regulations, 2022.

1.2 The 80/20 preference point system is applicable to all bids with a Rand value of up to R50 000 000,00 (all applicable taxes included)

1.3 Preference points for this bid shall be awarded for:

Price: 80

Specific Goals: 20

Total points for Price and Specific Goals must not exceed: 100

1.4 **Bidders who do not submit a valid proof as per paragraph 2.2 of KD24 (Principles) will score 0 points for Specific Goals.**

2. ALLOCATION OF PREFERENCE POINTS FOR SPECIFIC GOALS

2.1 The preference points that will be awarded in terms of the Specific Goals with regards to procurement processes shall be as follows (one table will be applicable for each bid):

Table 1: Specific Goals for Targeted Procurement

No	Specific Goals for Targeted Procurement	Points for 80/20 PPS
RDP Programme: Promotion of SMMEs		
1	EME or QSE entities which are at least 51% owned by black people	4 points
2	EME or QSE entities which are at least 51% owned by black women	4 points
3	EME or QSE entities which are at least 51% owned by black youth	4 points
4	EME or QSE entities which are at least 51% owned by black military veterans	4 points
5	EME or QSE entities which are at least 51% owned by black people living with disabilities	4 points
Total Points Per PPS		20 points

Table 2: Specific Goals for General Procurement

No	Specific Goals for General Procurement	Points for 80/20 PPS
RDP Programme: Promotion of SMMEs		
1	EME or QSE entities which are 100% owned by black people	20 points
2	EME or QSE entities which are at least 51% owned by black people	18 points
3	EME or QSE entities which are at least 35% owned by black people	16 points
4	EME or QSE entities which are at least 25% owned by black people	10 points
Total Points Per PPS		20 points

- a) General procurement may typically include but is not limited to commercial-off-the-shelf (COTS) items.

Table 3: Specific Goals for Other Procurement

No	Specific Goals for Other Procurement	Points for 80/20 PPS
RDP Programme: Promotion of South African Owned Enterprises		
1	Entities which are BBBEE Level 1	20 points
2	Entities which are BBBEE Level 2	18 points
3	Entities which are BBBEE Level 3	16 points
4	Entities which are BBBEE Level 4	10 points
Total Points Per PPS		20 points

Table 4: Specific Goals for Procurement from Entities Located in Specific Province, Region or Municipality

No	Specific Goals for Procurement from Entities Located In Specific Province, Region or Municipality	Points for 80/20 PPS
RDP Programme: Locality		
1	Entities located within the specific locality	10 points
2	Entities located outside the specific locality	0 points
RDP Programme: Promotion of South African Owned Enterprises		
1	EME or QSE entities which are at least 51% owned by black people	2 points
2	EME or QSE entities which are at least 51% owned by black women	2 points
3	EME or QSE entities which are at least 51% owned by black youth	2 points
4	EME or QSE entities which are at least 51% owned by black military veterans	2 points
5	EME or QSE entities which are at least 51% owned by black people living with disabilities	2 points
Total Points Per PPS		20 points

Table 5: Specific Goals for Procurement from Entities with Local Manufacturing Capabilities for Designated Sectors

No	Specific Goals for Procurement from Entities with local manufacturing capabilities for designated sectors	Points for 80/20 PPS
Designated Sectors		
1	Full compliance to the applicable minimum threshold for local content	10 points
2	Non-compliance to the applicable minimum threshold for local content	0 points
RDP Programme: Promotion of South African Owned Enterprises		
1	EME or QSE entities which are at least 51% owned by black people	2 points
2	EME or QSE entities which are at least 51% owned by black women	2 points
3	EME or QSE entities which are at least 51% owned by black youth	2 points
4	EME or QSE entities which are at least 51% owned by	2 points

	black military veterans	
5	EME or QSE entities which are at least 51% owned by black people living with disabilities	2 points
Total Points Per PPS		20 points

Table 6: Concurrent Application of Specific Goals

No	Concurrent Application of Specific Goals	Points for 80/20 PPS
RDP Programme: Promotion of SMMEs		
1	EME or QSE entities which are at least 51% owned by black people	5 points
RDP Programme: Locality		
2	Entities located within the specific locality	5 points
Local Manufacturing Capabilities for Designated Sectors		
3	Full compliance to the applicable minimum threshold for local content & production	5 points
RDP Programme: Promotion of South African Owned Enterprises		
4	Entities which are BBBEE Level 2 or better	5 points
Total		20 points

Table 7: Specific Goals for Income Generation, Disposal or Leasing of Assets

No	Specific Goals for Income Generation, Disposal or Leasing of Assets	Points for 80/20 PPS
RDP Programme: Promotion of South African Owned Enterprises		
1	Entities which are BBBEE Level 1	20 points
2	Entities which are BBBEE Level 2	18 points
3	Entities which are BBBEE Level 3	16 points
4	Entities which are BBBEE Level 4	14 points
Total Points Per PPS		20 points

2.2 PRINCIPLES

2.2.1 Valid proof of B-BBEE status is either of the following:

A) A B-BBEE sworn affidavit fully completed and

- I. Deposed and signed in the presence of the commissioner of oaths (certified true copy not acceptable)
 - II. Does not contradict itself (% black ownership matches compliance level)
 - III. Commissioner of oaths credentials and signature are reflected.
- B) A B-BBEE certificate issued by either the CIPC or a SANAS accredited verification agency.
- C) An entity submitting an unincorporated joint venture / consortium must attach a consolidated B-BBEE certificate in the name of the joint venture / consortium issued by a SANAS accredited verification agency.
- d) B-BBEE status must be based on the latest financial year-end information which is used to determine the total revenue, otherwise it is invalid and unacceptable. Financial year end to be stipulated by **dd/mm/yyyy** (Refer to paragraph (i) of the BBEE Guide referred to below)
- e) The bid must be accompanied by the CIPC Beneficial Ownership Declaration. The declaration should be the latest lodged with CIPC.
- f) The bidder must submit the company registration documents issued by Companies and Intellectual Property Commission (CIPC) accompanied by the latest share register and share certificate for (Pty) Ltd and Ltd signed by the Company Secretary or registered Auditor.
- g) *A guide on validity of BBEE affidavits and BBEE certificates is available on Armscor's website.*

2.2.2 Military Veterans

- a) Military Veterans Act 18 of 2011 defines a military veteran as
- i. a South African who rendered military services to any of the military organisations (statutory and non-statutory) which were involve in all sides of South Africa's Liberation war from 1960 to 1994.
 - ii. Served in the Union Defence Force before 1961; or
 - iii. Became a member of the new South African National Defence Force after 1994, and has completed his or her military training and no longer performs military service, and has not been dishonourably discharged from that military organisation or force.
- b) The bidder shall submit with the bid documents a confirmation letter issued by the Department of Military Veterans with a force number, confirming that the shareholder of the entity is a Military veteran.
- i. For military veteran beneficiaries, the bidder shall submit a confirmation

letter issued by the Department of Military Veterans indicating all the beneficiaries of the Military Veteran.

2.2.3 Local content and production

- A) The dtic designate and determine a stipulated minimum threshold for each sector which is designated
- B) Local content and production refers to the mandate where a minimum stipulated percentage of goods, services or inputs be locally sourced and manufactured within South Africa to boost the local industry, create jobs and develop industrial capacity.
- C) The complete list of sectors and sub-sectors which are designated for local production with minimum local content threshold can be found on the website of the department of trade, industry & competition via the link below.

<http://www.thedtic.gov.za/sectors-and-services-2/industrial-development/industrial-procurement/>

- d) The bidder shall submit with the bid documents a fully completed annexure c indicating compliance to the stipulated minimum local content threshold of a commodity
- e) Where a bidder is unable to meet the stipulated minimum local content threshold the bidder shall submit with the bid an exemption letter issued by the dtic.

2.2.4 Locality

- A) The bidder must submit the municipality bill/local councillor letter (must be not be older than 3 months).
 - A) In an event where the bidder is the lessee, the municipality bill and the lease agreement must be submitted.
 - B) In an event where the bidder owns the property, the municipality bill must be in the name of the bidder or owner.

2.2.5 Sub-Contracting

- A) It is a requirement of Armscor that subcontracting must be considered by a bidder. Where feasible the bid shall indicate the minimum sub-contracting percentage applicable. Armscor shall endeavour to advance designated groups where applicable.
- B) A bidder awarded a contract must obtain the approval of Armscor prior to any changes in the subcontracting arrangement.

2.2.6 Ownership

In accordance with the provisions of the Defence Sector Code, it is a requirement of Armscor that all suppliers that do business with Armscor should achieve at least 35% black equity ownership and may be included as a bid requirement.

2.2.7 Verification of bidders information

The Armscor reserves the right to require a bidder and/or its sub-contractor(s) to substantiate any claim at any stage in the bidding process to verify and confirm the specific goals claim of the bidder and/or its sub-contractor(s).

Fronting means a deliberate circumvention or attempted circumvention of the B-BBEE Act and the Codes. Fronting commonly involves reliance on data or claims of compliance based on misrepresentations of facts, whether made by the party claiming compliance or by any other person.

Kindly note that any misrepresentations of facts will lead to disqualification of bid and also further steps be taken to recover the loss where applicable and list the company and its directors in the list of restricted bidders from doing business with the State with National Treasury,

B-BBEE DECLARATION**1. Confirmation of the Bidder's Turnover**

Name of the Bidder		
Registration Number		
Financial Year End		
Turnover (As at the latest financial year end)	R	Period Starting (Day, Month, Year)
		Period Ending (Day, Month, Year)

2. Confirmation of Subcontractors involved in the execution of the order:

Bidder	% Black Ownership	B-BBEE Status	% Value to be Contracted
1.			
Subcontractors	% Black Ownership	B-BBEE Status	% Value to be Contracted
1.			
2.			
3.			

***Percentages of the bid value which will be subcontracted including main contractor must add up to 100%.**

3. Confirmation of Suppliers involved in the execution of the order:

Supplier's name	% Black Ownership	B-BBEE status	% Value to be Supplied
1.			
2.			
3.			
4.			
5.			

I, the undersigned, am duly authorised to certify on behalf of the abovementioned entity that the information contained herein above is true and correct.

AUTHORISED SIGNATURE:

Name in block Letter: _____

Date: _____

Capacity: _____

DEFENCE SECTOR B-BBEE SWORN AFFIDAVIT – EXEMPTED MICRO ENTERPRISE

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

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

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of "Black People"	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;"
Definition of "Black Designated Groups"	"Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;"

3. I hereby declare under Oath that:

- a) The Enterprise has _____ % Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- b) The Enterprise has _____ % Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- c) The Enterprise has _____ % Black Designated Group Beneficiaries as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- d) Black Designated Group Owned % Breakdown as per the definition stated above:
- i) Black Youth % = _____ %
 - ii) Black people living with disabilities % = _____ %
 - iii) Black Unemployed % = _____ %
 - iv) Black People living in Rural areas % = _____ %
 - v) Black Military Veterans % = _____ %
- e) Based on the Audited Financial Statements/Financial Statement and other information available on the latest financial year-end of _____ (DD/MM/YYYY), the annual Total Revenue was R5,000,000.00 (Five Million Rands) or less.
- f) Please confirm on the table below the B-BBEE level contributor, by ticking the applicable **box**.

100% Black Owned	Level One (135% B-BBEE procurement recognition)	☐
At Least 51% Black Owned	Level Two (125% B-BBEE procurement recognition)	☐
Less than 51% Black Owned	Level Four (100% B-BBEE procurement recognition)	☐

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

Commissioner of Oaths	Deponent
Credentials and Signature	
	Signature
Date	Date

Issued in terms of the Defence Sector Code (Gazette 42391 - 12 April 2019)

DEFENCE SECTOR B-BBEE SWORN AFFIDAVIT – QUALIFYING SMALL ENTERPRISE

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

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

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Type of Entity (CC, (Pty) Ltd, Sole Prop etc.):	
Nature of Business:	
Definition of "Black People"	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;"
Definition of "Black Designated Groups"	"Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas; (e) Black military veterans who qualifies to be called a military veteran in terms of the Military Veterans Act 18 of 2011;"

3. I hereby declare under Oath that:

- a) The Enterprise has _____% Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- b) The Enterprise has _____% Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- c) The Enterprise has _____% Black Designated Group Beneficiaries as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- d) Black Designated Group Owned % Breakdown as per the definition stated above:
 - vi) Black Youth % = _____%
 - vii) Black people living with disabilities % = _____%
 - viii) Black Unemployed % = _____%
 - ix) Black People living in Rural areas % = _____%
 - x) Black Military Veterans % = _____%
- e) Based on the Audited Financial Statements/Financial Statements and other information available on the latest financial year-end of _____ (DD/MM/YYYY), the annual Total Revenue was between R5,000,000.00 (Five Million Rands) and R50,000,00.00 (Fifty Million Rands).
- f) Please confirm on the table below the B-BBEE level contributor, by ticking the applicable box.

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

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

Commissioner of Oaths	Deponent
Credentials and Signature	Signature
Date	Date

Issued in terms of the Defence Sector Code (Gazette 42391 - 12 April 2019)

SARS: TAX COMPLIANCE STATUS

NOTE: It is a condition of bids that the successful bidder **MUST** be tax compliant, or that satisfactory arrangements have been made with the South African Revenue Service (SARS) to meet the bidder's tax obligations. **FOREIGN COMPANIES ARE REQUIRED TO COMPLETE QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS OF ANNEXURE 1 TO KD25.**

1. In order to meet this requirement the bidder is required to access SARS e-filing and complete the SARS ONLINE "SARS tax compliance status" under tax status. Tax compliance requirements are also applicable to individuals who wish to submit bids.
2. SARS will then furnish the bidder with a Tax compliance PIN code that will be valid for a period of 1 (one) year from the date of approval.
3. The Tax compliance PIN letter shall be submitted with the bids, with an authorisation letter for Armscor to use the PIN code for verification of tax compliance status of the bidder.
4. In bids where Consortia /Joint Ventures / are involved, each party must submit a separate tax compliance PIN with authorisation letter.
5. In the event of subcontracting, tax compliance PIN letter and authorisation letter for the subcontractor must also be submitted with the bids.
6. Tax compliance is done via e-filing on the SARS website www.sars.gov.za.

NOTE: Armscor Suppliers/ Bidders and Subcontractors must remain tax compliant for the duration of their contracts.

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF ARMSCOR

BID NUMBER:	RFB No: EFIN/2026/16	CLOSING DATE:	17 September 2026	CLOSING TIME:	11h00
DESCRIPTION	RENDERING OF BROKER SERVICES FOR THE SHORT-TERM CORPORATE INSURANCE PORTFOLIO OF ARMSCOR GROUP				

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:

ARMSCOR BID BOX VISITORS ENTRANCE (BLOCK 8),
370 NOSSOB STREET,

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Mr. A.L Mmbengwa	CONTACT PERSON	Mr. A.L Mmbengwa
TELEPHONE NUMBER	012 428 3610	TELEPHONE NUMBER	012 428 3610
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	N/A
E-MAIL ADDRESS	scmbids@armscor.co.za	E-MAIL ADDRESS	scmbids@armscor.co.za

SUPPLIER INFORMATION

NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE	NUMBER	
CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE	NUMBER	
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	OR CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ No

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No
---	--	--	--

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.	

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, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

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 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:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

3. BIDDER'S DECLARATION

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

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

Full Name	Identity Number	Name of State Institution

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

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

2.2.1 If so, furnish particulars:

.....

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

2.3.1 If so, furnish particulars:

.....

4. DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 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.

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

- 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.

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

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

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

ARMAMENTS CORPORATION OF SOUTH AFRICA LIMITED (ARMSCOR)

INTELLECTUAL PROPERTY REQUIREMENTS

2. INTRODUCTION

2.1 What is Intellectual Property?

Intellectual Property (or "IP") means the result or outcome of creative or innovative effort as typically, but not exclusively, manifested and embodied in or taking the form of data items or documents.

IP includes design and mental activities, e.g.:

- a) Bills of Material (BOM's)
- b) Instructions,
- c) Reports,
- d) Specifications,
- e) Interface designs,
- f) Manufacturing processes,
- g) Material Specifications,
- h) Processes,
- i) Product designs,
- j) Re-engineering (maintenance/obsolescence),
- k) Software,
- l) Algorithms,
- m) Source Codes,
- n) System/integration designs,
- o) Test and Evaluation Methods, etc.

IP excludes Project Management activities and Hardware created/built according to a design or following a "recipe".

2.2 How is IP manifested?

IP is manifested and embodied in Data Items or Documents.

"Data items or Documents" means any recorded information, however recorded, including but not limited to books, manuscripts, reports, studies, algorithms, computer software, invention descriptions, registered patents, drawings, designs, plans, analyses, calculations, standards, data packs, process documents, instructions, specifications, mathematical or simulation models, compositions, photographs, video recordings, audio recordings, reports, holographic recordings, trademarks, graphical images, etc.

This list is non exhaustive and includes any protectable subject matter under applicable intellectual property law.

NOTE:

- The document itself is not IP
- The contents of a document represent IP
- The document becomes the tangible and recordable carrier of IP

2.3 What is Background IP?

For definition, refer to A-STD-0020 "Armcor General Conditions of Contract". "Background IP" belongs to a contractor who has fully paid for its generation or has acquired it at its own cost, and which may be used or serve as a basis for developing new Foreground IP.

2.4 What is Historic IP?

"Historic IP" is existing IP which was created previously, and which may serve as a basis from which to develop new Foreground IP.

2.5 What is Foreground IP?

For definition, refer to A-STD-0020 "Armcor General Conditions of Contract". "Foreground IP" is a new intellectual property that is created during the execution of the order.

2.6 When is IP Shared or Jointly Owned or Co-owned?

For the definition, refer to A-STD-0020 "Armcor General Conditions of Contract".

"Shared," "Jointly Owned," or "Co-owned" IP is IP that belongs to both the DOD and a contractor because both contributed to its generation. Ownership is typically (and preferably) proportional to contribution.

Historic and Foreground IP may be either

- a) wholly owned by the DOD, or
- b) shared or Jointly Owned or co-owned between DOD and the contractor

3. IP RECORDAL REQUIREMENTS

Prospective suppliers must provide all information regarding applicable Intellectual Property (IP) to the bid. Armcor will record the information on their IP System, which will generate a Statement of IP, which will be appended to the order. The Statement of IP will constitute the contractual agreement between Armcor and the contractor with respect to IP matters.

The recordal requirements are further described herein and broken down to an appropriate level, as follows:

3.1 Background IP Utilised

For each Background IP Item that will be modified or utilised to generate Foreground IP in the execution of the quoted scope of work, provide the following details:

- a) Short IP description
- b) Original Supplier
- c) Cost of Establishment (If available)

3.2 Historic IP Utilised

For each Historical IP item that will be modified or is required as a prerequisite in the execution of the quoted scope of work, provide the following details:

- a) Armscor IP Number (if available)
- b) Short IP description
- c) The next information is to be provided per order, on which the Historic IP was established:
 - i) Order Number on which Historic IP was generated
 - ii) Master record index (MRI) reference
 - iii) Original Supplier
 - iv) Cost of Establishment
 - v) Percentage Ownership (DOD)
 - vi) Associated Milestone / Line item on the order under which the IP was established

3.3 Foreground IP to be generated

For each new Foreground IP item that will be generated in the execution of the quoted scope of work, provide the following details:

- a) IP number of Historic IP, if IP is enhanced (modified / improved / upgraded).
- b) Short IP description
- c) Master record index (MRI) reference with version and date
- d) Original Supplier
- e) Cost of Establishment
- f) Percentage Ownership (DOD)
- g) Associated Milestone / Line item on the order under which the IP will be established.

NOTE: 1 The cost of establishment has always been included in item/milestone prices of orders, and will continue to be so included, but will in future become visible by being shown separately in the Statement of IP

appended to orders in order to properly manage such IP;

NOTE: 2 To facilitate the easy and correct recording of IP, bidders and contractors will be required to utilise the specially constructed spreadsheet from Armscor's website. Upon completion, the spreadsheet must be printed and attached to the bid, thereby forming an integral part of the bid.

4. SAFEGUARDING OF IP

4.1 IP Assignment Agreement

The IP Assignment Agreement, which will be based on the Statement of IP and the Statement of Work, will be concluded with the main contractor in the main contractor's name and will apply to the creating sub-contractor(s), who will remain the design authority for the particular IP.

4.2 Management and Safeguarding of IP

The main contractor will be responsible for managing IP generated during the execution of the order, as well as IP generated by its subcontractors. Upon completion of the project or order, the relevant IP will be formally transferred to the main contractor, who will then be responsible for its continued management.

The main contractor will be responsible for proper safeguarding and configuration control of IP, including off-site back-ups, as further described in various other Armscor documents, e.g. A-STD-0020 "Armscor General Conditions of Contract, K-STD-61 "Armscor Standard for Technical Contract Conditions", A-WI-014 "Armscor Security Instruction" and other documents that may be applicable.

4.3 IP Delivery

Notwithstanding 3.2 above, upon completion of the order, the main contractor will deliver all data items or documents relating to the IP generated during the execution of the order to Armscor ADAC Department.

4.4 IP Audits

Armscor is required by law to conduct an IP intangible asset audit of all existing DOD IP *every financial year*. The main contractor will cooperate with Armscor's Intellectual Property Management Division and the Auditor General during the audit period and will make available all relevant information required to conduct the audit.

5. COMPLETION OF THE IP INFORMATION BY MEANS OF THE ELECTRONIC FORM

5.1 Background

The electronic form of the KD27 IP Information.xlsx is available as a Microsoft Excel workbook on the Armscor website:

(www.armscor.co.za/Downloads/Download.asp) and must be used as a template to provide the relevant IP information.

The workbook consists of the following three spreadsheets:

- a) "Background IP" provides a form to capture all background IP information
- b) "Historic IP" provides a form to capture all historic IP information.
- c) "Foreground IP" provides a form to capture all foreground IP information.

5.2 Electronic Form Definitions

The column definitions as provided in the forms are as follows:

IP Description	An abridged description of the IP Item.
Original Supplier	The name of the supplier at which the IP item exists or was established.
Establishment Cost	The amount paid by Armscor to establish the IP Item (including VAT).
MRI Reference	The Master Record Index (MRI) or other document reference that uniquely describes the IP.
DOD Shareholding	The percentage of the IP that belongs to the DOD through Armscor
Associated Invoice Item	The contractual invoice item that will serve as the basis for IP payment.

6. INTELLECTUAL PROPERTY QUESTIONNAIRE

I/We, the undersigned, who warrant that I/we am/are duly authorised to do so on behalf of the firm, certify that the following information is correct and complete in terms of Intellectual Property relevant to the offered scope of work. (Please mark the relevant answer)

Will Background IP be applicable during the execution of the quoted scope of work?	Yes ☐	No ☐
If yes, state particulars by completing the 'Background IP' worksheet. Indicate each IP item as a separate line.		
Will Historic IP be utilised and/or is it required as a prerequisite for executing the quoted scope of work?	Yes ☐	No ☐

If yes, state particulars by completing the 'Historic IP' worksheet for each IP item. Indicate each IP item as a separate line.

Will any of these Historic IP items be enhanced during the execution of the quoted scope of work? Yes No
☐ ☐

If yes, also complete the 'Foreground IP' worksheet for those IP items.

Will a new Foreground IP be generated during the execution of the quoted scope of work? Yes No
☐ ☐

If yes, state particulars by completing the 'Foreground IP' worksheet for each IP item. Indicate each IP item as a separate line.

This completed form, along with all additional information, as requested above where relevant, populated on the KD27 Spreadsheet, has to be attached to the bid.

WITNESSES:

1 _____

2 _____

SIGNATURES OF BIDDER(S)

DATE: _____

ADDRESS: _____

