

RFT NUMBER:	RFT 03 2025_2026
DESCRIPTION:	RE-ADVERTISEMENT OF TENDER FOR THE APPOINTMENT OF SERVICE PROVIDER FOR PROVISION OF INSURANCE BROKER FOR A PERIOD OF 24 MONTHS
PUBLICATION DATE:	03 OCTOBER 2025
VALIDITY PERIOD:	120 DAYS FROM THE CLOSING DATE
CLOSING DATE:	24 OCTOBER 2025
CLOSING TIME:	11:00 am
BRIEFING SESSION:	NONE
BID RESPONSES MUST BE HAND DELIVERED / COURIERED TO FPB TENDER BOX LOCATED AT THE RECEPTION WEEKDAYS - MONDAY TO FRIDAY FROM 08H00AM TO 16H00PM	Film and Publication Board (FPB), Eco Glades 2, 420 Witch Hazel Ave, Eco Park, Centurion 0169 (PRETORIA)
SCM INQUIRIES: For all bidding related enquiries	Ms. Makhosazana Hlatshwayo E-mail: tenders@fpb.org.za Tel: 012 003 1400
NAME OF BIDDER:	
CSD NUMBER:	
TOTAL BID AMOUNT OFFER (Including VAT): R	

TENDER INSTRUCTIONS

1. Bid documents should be completed with a black pen.
2. All pages of the tender documents should be initiated.
3. Tender documents should be fully completed and neatly binded.
4. All the necessary supporting documents should be attached to the tender documents clearly marked as annexures on the table of contents.
5. On submission of tender, bidders should ensure that they sign a bids submission register at reception.
6. Bidders should ensure that along with the original bid documents, they should submit a USB and relevant supporting documents.
7. Late tenders will be regarded as unacceptable bid.
8. Online or electronics submission is not accepted, and those tenders not deposited in the relevant tender box, will NOT be accepted.
9. There is no briefing session for this tender.
10. Bidder must submit proof of BBBEE scorecard to claim points for a specific goal.
11. All clarity seeking questions and enquiries should be directed to Supply Chain Management Division (E-mail: tenders@fpb.org.za) that important information can be shared with other bidder (if applicable).

“In submitting any information or documentation requested above or any other information that may be requested pursuant to this RFQ/tender, you are consenting to the processing by FPB or its stakeholders of your personal information and all other personal information contained therein, as contemplated in the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder (“POPI Act”). Further, you declare that you have obtained all consents required by the POPI Act or any other law applicable. Thus, you hereby indemnify FPB against any civil or criminal

action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information that you submit.”

Name and Surname:.....

Signature:

A. CERTIFICATES OF AUTHORITY FOR SIGNATORY

Status of concern submitting tender (delete whichever is not applicable.)

COMPANY /PARTNERSHIP /ONE-PERSON BUSINESS /CLOSE CORPORATION/
JOINT VENTURE

B. COMPANIES

If the bidder is a company, a certified copy of the resolution of the Board of Directors, personally signed by the chairperson of the board, authorizing the person to signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid or contract on behalf of the company must be submitted with this Bid.

An example is shown below:

By resolution of the board of Directors on.....20....., Mr. / Ms

..... has been duly authorized to sign all documents in connection with

BID NO. RFT03 2025_2026

SIGNED ON BEHALF OF THE COMPANY:

.....

IN HIS CAPACITY AS:

.....

DATE:

.....

SIGNATURE OF

SIGNATORY:

WITNESSES:

1.

2.

C. PARTNERSHIP

The following particulars in respect of every partner must be furnished and signed by every partner:

Full name of partner	Residential address	Signature
.....
.....
.....

We, the undersigned partners in the business trading as

Hereby authorize to sign

this bid as well as any contract resulting from the bid and any other documents

and correspondence in connection with this bid / or contract on our behalf.

.....
Signature	Signature	Signature
.....
Date	Date	Date

D. ONE-PERSON BUSINESS

I, the undersign..... hereby confirm that I am the
sole owner of the business trading as.....

.....
Signature

.....
Date

E. CLOSE CORPORATION

If the case of a close corporation submitting a bid, a certified copy of the founding Statement of such corporation shall be included with the Bid, together with a resolution by its members authorizing a member or other official of the corporation to sign the documents and correspondence in connection with this bid or contract on behalf of the company must be submitted with this Bid.

An example is shown below:

By resolution of the members at the meeting on the20..... at
.....Mr. / Ms whose signature appear below,
has been duly authorized to sign all documents in connection with **BID NO.**

RFT03 2025_2026

SIGNED ON BEHALF OF THE CLOSE CORPORATION:

.....

IN HIS / HER CAPACITY AS:

DATE:

SIGNATURE OF SIGNATORY:

WITNESSES:1

2.....

Certificate of Authority for Joint Ventures

This Returnable Schedule is to be completed by joint ventures.

We, the undersigned, are submitting this bid offer in Joint Venture and hereby authorize Mr. /Ms..... , authorized

Signatory of the company....., acting in the capacity of lead partner, to sign all documents in connection with the bid offer and any contract resulting from it on our behalf.

NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
		Signature. Name Designation
		Signature. Name Designation
		Signature. Name Designation
		Signature. Name Designation

TERMS OF REFERENCE FOR RE-ADVERTISEMENT OF TENDER FOR THE APPOINTMENT OF SERVICE PROVIDER FOR PROVISION OF INSURANCE BROKER FOR A PERIOD OF 24 MONTHS

1. Introduction

Film and Publication Board (hereinafter referred to as “the Regulator”) intends to appoint a Short-Term Insurance Broker to provide brokerage services to Film and Publication Board for a period of 24 months.

2. Purpose of the bid

The purpose of this bid is to procure the services of a competent insurance broker to assist FPB in placing and managing its short-term insurance portfolio, for a period of 24

3. Background

The broker will secure adequate insurance cover for FPB assets (including vehicles, electronic equipment, portable computer equipment/laptops, office equipment, SASRIA & fire), Public Liability.

Proposals made to FPB should be based on the most cost-effective placement of the insurance portfolio in the insurance market, taking into serious consideration the limitation of financial risk exposure.

The appointed Short-Term Insurance Broker will not be allowed to increase their fee and insurance premium in year 2 with not more than the CPI, unless substantiating proof from the quotations received from the insurers reflect a hardening insurance market based on valid known claims incidents or there is a significant increase in values insured.

Proposals received by the Short-Term Insurance Broker from the insurers must be made available for scrutiny and approval by FPB annually.

Bidders must cover and support FPB's Head Office situated in Centurion, Regional Offices in other provinces.

FPB Offices – Current Locations

Head Office

- Eco Park: Centurion (420 Witch Hazel Ave ECO Park, Centurion, 0169)

Regional Offices

- Cape Town (209 Beach Road, 4th Floor, Sea Point, Cape Town, 8060)
- Durban (6th Floor, SABC 100 KE Masinga Road, Durban, 4001)

Important note: Goods in transit cover required (Premium to be inclusive) for instances mentioned below-

1. FPB offices normally relocate upon termination of lease contracts, the details for the new premises will be duly communicated. Goods in Transit cover is required for any future relocations which will take place within the Expiry of lease if not extended or renewed.
2. ICT Equipment assets movements:
3. Cross border movements – there will be instances whereby FPB officials are required to travel to our neighboring countries or internationally with assets for official purposes, these should be catered for.
4. Scope of work and Specific Requirements

4.1 Legislative Framework

All bidders must be compliant with all legislative framework governing insurance services, included but not limited to:

- Financial Advisory & Intermediary Services Act, 2002 (Act No. 37 of 2002)
- Short-term Insurance Act, 1998 (Act No. 53 of 1998)

All work is to be carried out in accordance with the time schedule as agreed with FPB.

4.2 **Services**

The services to be rendered as a Short-Term Insurance broker over 24 months should include general services related to the placement, maintenance and administration of the insurance portfolio. The proposal/services should incorporate at least the following general insurance actions:

- 4.2.1. Take-over account from current service provider;
- 4.2.2. Claims administration and maintenance;
- 4.2.3. Claims logging and tracking;
- 4.2.4. Review existing cover, limits & sums insured;
- 4.2.5. Establish uninsured risks, exposures and internal self-insurance capacity (provide value-add input/ perform assessments on risks);
- 4.2.6. Conduct insurance market exercise, conduct pre-renewal meetings to discuss excess structures and alternatives for renewal;
- 4.2.7. Presentation of renewal terms and recommended options;
- 4.2.8. Compilation of comprehensive insurance procedure manual as well as full summary on cover, limits, conditions and exclusions;
- 4.2.9. Monthly & Quarterly reporting (with recommendations);
- 4.2.10. Post loss surveys (with recommendations);
- 4.2.11. Provide advisory services to FPB on short-term insurance portfolio;
- 4.2.12. Provide account summary and handover process at the end of contract.

4.3. **Key requirements**

4.3.1 The Broker is expected to meet the following key requirements:

- 4.3.1.1. Provide a comprehensive and adequate short term insurance cover for various assets.
- 4.3.1.2. Provide a detailed list of cost effective insurances excesses for various categories or classes or sections including extensions, exclusions, claim preparation costs, general provisions, and preconditions.
- 4.3.1.3. Perform a full third party claims recovery service.

4.3.1.4. Attending to the re-registration of recovered vehicles, de- registration of written-off vehicles and de-installation of devices (i.e. tracking devices, e-tags etc.)

4.3.1.5. Provide training and or workshop to FPB staff on the management of insurance risks and relevant insurance procedures as well as provision of insurance tracking claim tool.

4.3.1.6. To conduct its business activities with the utmost good faith, honesty, integrity and transparency and consistently uphold the interests and needs of FPB as a client before any other consideration;

4.3.1.7. To ensure that any information acquired by the Broker from FPB will not be used or disclosed without the written consent of FPB; in compliance with POPI ACT.

4.3.1.8. To obtain all material information from FPB relevant to the assessment and acceptance of any risks by an insurance underwriter and communicate the information to the underwriter;

4.3.1.9. To comply with all legislation relating to the financial services industry always. In particular, the Broker must only offer advice and render intermediary services in respect of financial products for which the Broker is authorized or mandated, in terms of the Financial Advisory and Intermediary Services Act, 2002 and the Short-term Insurance, Act No. 53 of 1998.

4.4.2. The Broker must be an authorized Financial Services Provider and the Broker representatives must ascribe to the Code of Conduct for financial services providers as promulgated in terms of Section 15 of Financial Advisory and Intermediary Services Act. 2002.

The Broker and/or its representatives shall:

4.4.2.1 Act honestly, fairly, and with due skill, care and diligence, in the interests of FPB and the integrity of the financial services industry;

4.4.2.2 Have and employ effective resources, procedures and appropriate technological systems for the proper performance of professional activities;

4.4.2.3 Seek from FPB appropriate and available information regarding their financial situation, financial product experience and objectives about the financial service required;

4.4.2.4. Act with circumspection and treat FPB fairly where there is any conflict of interests;

- 4.4.2.5 Comply with all applicable statutory or common law requirements applicable to the conduct of business.
- 4.4.2.6 Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with FPB;
- 4.4.2.7. Keep adequate and appropriate records;
- 4.4.2.8. Avoid fraudulent and misleading advertising, canvassing and marketing;

5. Insurance Portfolio

Types of insurance cover required by the FPB are listed below.

5.1. Types of Cover Required

Type of Coverage	Sum Insured/ Indemnity Limit
See attached Schedule 1 (FPB's asset register Summary with Net Book Values)	
Motor Vehicles/Fleet <u>(Comprehensive)</u> Own damage, 3 rd party liability, including medical expenses	
Electronic Equipment (All Risks); Technical (Test) Equipment, including mobile, loose/fitted in motor vehicles, portable equipment including software and associated programmes. <i>This also includes cellphones used for technical purposes, i.e. testing quality of service</i>	

Computer Equipment Including portable Laptops, desktops (PCs) are office based + software (Worldwide cover); including material damage, transit, reinstatement of data, increase in cost of working	
Office Equipment All data processing equipment, owned, hired or leases, including PABX, Telephone system & ancillary equipment; CCTV & access control systems, servers	
Public Liability	
SASRIA/Fire	

5.2. YEAR LOSS HISTORY – RISK PROFILE

5.2.1. MOTOR VEHICLES

PERIOD: 2019 - 2024

2024

Whilst insured vehicle was parked - R 2,900.00

Whilst insured vehicle was driven on public road - R 86,700.02

Whilst insured vehicle was driven on public – R 15,578.43

Whilst insured vehicle was driven on public - R 2,452.44

Grand Total: R107 630.89

Claims Ratio 16.81%

2023

Windscreen/Sheet-glass replaced – R 3,491.00

Windscreen/Sheet-glass replaced – R 3,281.00

Whilst insured vehicle was driven on public road – R 82,571.81

Whilst insured vehicle was driven on public road – R 86,955.98

No Further Description - R 2,892.00

Grand Total: R 179,191.80

Claims Ratio 15.31%

2021

Collision whilst insured vehicle was driven - R 66,556.30

Grand Total: R66,556.30

Claims Ratio 9.57%

2020

Loss/Damage whilst insured vehicle was driven - R 15,869.79

Windscreen/Sheet-glass repaired – R200.00

Loss/Damage whilst insured vehicle was driven - R 10,096.52

Windscreen/Sheet-glass replaced - R 3,356.72

Collision whilst insured vehicle was driven - R 149,704.96

Grand total = R 179,228.00

Claims Ratio 24.58%

5.2.2. ELECTRONIC EQUIPMENT

PERIOD: 2019 - 2024 (5) years

2022

Away from Premises - R 13,212.70

Grand Total: R 13,212.70

Claims Ratio 1.70%

2021

No Further Description - R 3,285.20

Grand Total: R 3,285.20

Claims Ratio 9.57%

2020

Away from Premises - R 770.00

Grand Total: R770.00

Claims Ratio 24.58%

2019

Section paid amount – R - 889.57

5.3. Administration

The successful bidder will be required to:

5.3.1. Advise and consult with FPB on the renewal strategy (if applicable;

5.3.2. Obtain the required insurance cover from the insurance industry based on the needs of FPB, the prevailing market conditions at the time and the insurance products that are available to mitigate or partly mitigate the risks as identified;

5.3.3. Indicate if there is an automated claims logging system in place to handle and track progress on outstanding claims. This system must have the ability to flag claims which are aging and send tasks to persons assigned for follow-up. This is intended to eliminate the manual paper-based logging and tracking processes.

5.3.4. Assist in the claims process by ensuring that claims are submitted correctly and on time; Ideally claims on portable computer & office equipment should be resolved within 2 weeks and technical equipment claims within a month;

5.3.5. Ensure that all claims lodged with the insurers and/or underwriters are supported by all the relevant documentation to ensure efficient settlement;

- 5.3.6. Ensure that FPB's contractual rights are enforced;
- 5.3.7. To act with FPB's interest in all dealings with the appointed insurers and prospective underwriters;
- 5.3.8. Ensure that the Broker's employees appointed to work on the FPB account fully understand the Brokers' obligations under the Code of Conduct and any other guidelines that may be issued by a regulatory body having jurisdiction over the Broker;
- 5.3.9. Render the following services to FPB monthly:
 - 5.3.9.1. Quarterly reconciliation of all claims data as per the claims register;
 - 5.3.9.2. Submit quarterly and annual reports on the insurance portfolio as and when is required.
- 5.3.8. Ensure that any third-party service provider appointed by an underwriter and/or insurer to render a service following the occurrence of an insured event is compliant with the taxation laws of the Republic of South Africa.
- 5.3.9. Ensure that third party service providers who render services following the occurrence of an insured event invoice the Broker/ Insurer for the services rendered.

5.4. Communication with FPB

The chosen Short-term Insurance Broker will also be responsible for the following on a quarterly basis:

- 5.4.1 Updating FPB on legal developments within the Short-term insurance industry and inform FPB on insurance product developments and the risk mitigation developments in the South African market;
- 5.4.2 Providing financial advice on the insurance portfolio in the event FPB request such advice;
- 5.4.3 Ongoing evaluation of uninsured risks and possible options for closing the gaps;
- 5.4.4 Reviewing the FPB Short-term insurance portfolio with FPB's Finance department and any other relevant internal department in a formalized pre-set meeting;

5.4.5 Assist FPB with the interpretation of insurance policy documents and matters incidental thereto, including the interpretation of insurance rules and regulations.

5.5. **Claims**

The Broker will be responsible for management of claims, for clarity and claims management needs to include:

5.5.1. Receiving claims from FPB and submitting them to the insurer as and when incidences occur;

5.5.2. On-going management of all outstanding claims;

5.5.3. Following up with the Insurer regarding the progress of claims;

5.5.4. Informing FPB of outstanding documents on claims if applicable;

5.5.5. Informing FPB about claim outcomes and when payments are made;

5.5.6. Ensuring correct calculation and payment of benefits by underwriter; and,

5.5.7. Interacting with Insurer where claims are repudiated.

5.6. **Policy documents**

The Broker will be responsible for:

5.6.1. Arranging on behalf of FPB for the issuing of the necessary policy documents by the insurer(s);

5.6.2. Continuously negotiate beneficial policy conditions for FPB with the Insurer(s).

5.7. **Company infrastructure**

The service provider (broker) must list all branches and offices of their company countrywide (Republic of South Africa) together with telephone numbers and provide their company profile incorporating summary details (if applicable).

5.7.1 Activity and service profile

5.7.1.1. Detailed description of main field of expertise/area of operation of company.

5.7.1.2. Range of services offered.

5.7.1.3. Reference list of some contracts completed not older than 10 years, including value, duration, location and contact persons.

5.7.1.4. List of current contracts and previous contracts value thereof. Submit a list of current contracts, contact person and contact numbers. Please also attach confirmation letters from listed clients on their company letterheads.

5.7.1.4.1 Current Projects (Please attach an annexure if the number of projects are more than the supplied rows)

[illegible]

5.7.1.4.2 Past Projects (Please attach an annexure if the number of projects are more than the supplied rows)

Name of organization Department/Company	Project Description	Date of appointment	Contract Period	Project Value	Contact Person

**5.7.1.5. Indicate if any contract with their company has ever been cancelled by a client?
If YES, provide details.**

5.7.2 Management and servicing

5.7.2.1. The service provider must please supply a brief description of how the company is organized together with an organizational organogram.

5.7.2.2. The service provider must please indicate a breakdown of staff compliment into management/ administration/ other services.

5.7.2.3. The service provider must provide details of qualifications and work experience for key personnel, identified for this project.

5.7.2.4. The service provider must please indicate if all these personnel employed on a full-time basis? If not, provide details.

5.7.2.5. Bidders previously submitted this tender reference must re-apply if interested in responding to tender re-advertisement

5.8. MANDATORY REQUIREMENTS

Failure to submit the below-mentioned will lead to the unacceptable bid:

- Company profile
- Proof of Company Professional Indemnity cover of R10 million.
- Proof of valid Company Registration with the Financial Sector Conduct Authority (FSCA)
- Proof of Company Registration with the Financial Intermediaries Association (FIA)

5.9. The evaluation of the functional / technical details of the proposal will be based on the following criteria:

Criteria	Requirements from service providers	Weight
<p>PROJECT MANAGER/LEADER/BROKER</p> <p><u>Bidder must submit abridged Curriculum Vitae (CV) and certified qualifications of an experienced Project Manager/Leader or Broker.</u></p> <p>Project Manager must demonstrate experience of managing short-term insurance portfolios and delivering brokerage services to meet FPB's requirements and must submit valid relevant accreditation.</p> <p>Submit certified copies of relevant qualification/s and Curriculum Vitae (CV) of Project Manager, Leader or Broker</p> <p>(Failure to submit relevant qualification/ CV will lead to zero points)</p>	<ul style="list-style-type: none"> • 15 points or more than 10 years of relevant working experience and 5 points for qualifications, valid relevant accreditation). • 10 points for over 6 years of relevant working experience and 5 points for relevant qualifications (certificates within the short-term insurance, valid relevant accreditation). • 5 points for 5 years of relevant working experience and 5 points for relevant qualifications, valid relevant accreditation). • 0 points for less than 5 years of relevant working experience and relevant qualifications, valid relevant accreditation). 	<p>20%</p>

<p>TEAM MEMBERS</p> <p>Team Members (a structure of 3 team members) must demonstrate experience of managing short-term insurance portfolios and delivering brokerage services to meet FPB's requirements</p>	<ul style="list-style-type: none"> • 15 points for submission of a structure of proposed project team members linked to the project with clear job roles and more than 10 years relevant working experience (Combined Experience) with 5 points if 1 or 3 members have the relevant qualification. • 10 points for submission of a structure of proposed project team members linked to the project with clear job roles with 5 – 9 years relevant working experience (Combined Experience) with 5 points if 1 or 3 members have relevant qualification. • 0 points for no submission 	<p>20%</p>
<p>EXPERIENCE OF A COMPANY</p> <p>Submit company profile that indicate knowledge of insurance, insurance</p>	<ul style="list-style-type: none"> • 10 points for company profile indicating more than 5 years of experience in providing Insurance Brokerage Services. 	<p>10%</p>

<p>broking and insurance underwriting business.</p>	<ul style="list-style-type: none"> • 5 points for company profile indicating 3 to 5 years of experience in providing Insurance Brokerage Services. • 0 points for company profile indicating less than 3 years of experience. 	
<p>CLIENT PROFILE</p> <p>Demonstrate knowledge of the local insurance industry by providing a client list of current and previous engagements whom similar services have been rendered.</p>	<p>Refer to table 5.7.1.4.1 & 2 of the bid</p> <ul style="list-style-type: none"> • 10 points for providing a list of above 5 clients-Combined (Past and Current Clients). • 5 points for providing a list of below 5 clients-Combined (Past and Current Clients) 	<p>10%</p>
<p>REFERENCE LETTER</p> <p>Bidders must provide sufficient reference letters where Insurance Brokerage services were successfully performed. Minimum to get score is 3 relevant letters.</p> <p>The reference letters for the projects must not be older than 10 years.</p> <p>The Bidders must ensure that the letters are signed, dated and must be on the client's letterhead with contactable references (telephone and email).</p> <p>Appointment letters will not be considered as reference</p>	<p>20 points for 5 and more valid relevant reference letters.</p> <p>15 points for 4 valid relevant reference letters</p> <ul style="list-style-type: none"> • 10 points for 3 valid relevant reference letters. 	<p>20%</p>

<p>CLIENT SERVICE METHODOLOGY</p> <p>Indicate service levels in terms of turnaround times for claim processing, account management structure and renewal process. Bidder to further support methodology with proof of ICT infrastructure available.</p> <p>The bidder must provide a project implementation plan which details how the services will be carried out. The project plan must have deliverables and time frames.</p>	<ul style="list-style-type: none"> • 5 points for providing detailed plan that indicates the resources and processes of the company to handle and settle insurance claims. • 5 points for demonstration of ICT infrastructure /systems available for process/logging claims. • 5 points for Turnaround times to handle insurance claims. • 5 points for Indicating service levels in terms of account management structure and renewal process. 	<p>20%</p>
		<p>100%</p>
<p>Bidder must achieve 70% to qualify further evaluation</p>		

5.9.1. Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 70 % and less will be eliminated from further evaluation

Gate 1: Compulsory Documents

The following duly completed and signed standard bidding documents (SBD) should be included in the tender proposal for pre-qualification:

The SCM Mandatory Document

The following duly completed and signed standard bidding documents (SBD) should be included in the tender proposal for pre-qualification:

Item that must be submitted		Non-submission will result in disqualification		to confirm submission	
1	Technical proposal		Original, Copy USB	YES	NO
2	Invitation to Bid – SBD 1 Bidder disclosure form – SBD 4 Preference Point Claim Form SBD 6.1		Completed and fully signed	YES	NO
3	Submit proof of Registration on Central Supplier Database (CSD) MAAA which confirms that: <ul style="list-style-type: none"> Bidder is tax compliant (non-compliant can be given 7 working days to rectify tax compliant status) No government employee is employed by bidder or shareholder or board member Bidder is not on the list of tender defaulters and is not on the list of restricted bidders 			YES	NO
4	ID Copies of Directors (certified)		Submit copy	YES	NO

ALL POINTS CLAIM FOR SPECIFIC GOALS IN THE BID MUST BE SUPPORTED BY THE

FOLLOWING: TABLE A BBBEE SCORECARD GUIDELINE:

80/20 Preferential Point System			
BB-BEE score of companies:			
Level 1	9 Points		
Level 2	8 Points		
Level 3	7 Points		
Level 4	6 Points		
Level 5	5 Points		
Level 6	4 Points		
Level 7	3 Points		
Level 8	2 Points		
Non-compliant	0		

Only Bidders that have met the 70 points threshold will proceed to price and specific goals. Price and Specific Goals will be evaluated as follows:

Responsive bids will be adjudicated on the 80/20-preference point system in terms of which points are awarded to bidders on the basis of:

- The bid price (maximum 80 points)
- Points claim for specific goals (maximum 20 points)

- (A) CIPC (Companies and Intellectual Properties Commission)
- (B) Sworn affidavit /BBBEE certificate indicating the level of ownership in the enterprise/person historical disadvantaged by unfair discrimination on the basis of race
- (C) CSD Full Report (Central Supplier Database)
- (D) Proof business address, Gauteng or National

**PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

Name of bidder.....	Bid number... RFT03 2025_2026
Closing Time 11:00	Closing date.....

OFFER TO BE VALID FOR...120...DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY ** (ALL APPLICABLE TAXES INCLUDED)
-------------	----------	-------------	---

-
- Required by:
 - At:
.....
 - Brand and model
 - Country of origin
 - Does the offer comply with the specification(s)? *YES/NO
 - If not to specification, indicate deviation(s)
 - Period required for delivery
*Delivery: Firm/not firm
 - Delivery basis

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

** “all applicable taxes” includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

*Delete if not applicable

10 PRICING INSTRUCTION

10.1 General

10.1.1 This section provides the tenderer with guidelines and requirements with regard to the completion of the Price Schedule. The Schedule has to be completed in black ink and the tenderer is referred to the Tender Specifications in regard to the correction of errors.

10.1.2 The Price Schedule shall be read with all the documents which form part of this Contract.

10.1.3 The following words shall have the meanings hereby assigned to them:

Unit: The unit of measurement for each item of work in terms of the Specifications and the Project Specifications.

Quantity: The number of units of work for each item.

Rate: The payment per unit of work at which the tenderer tenders to do the work.

Price: The product of the quantity and the rate tendered for an item.

Lump sum: An amount tendered for an item, the extent of which is described in the Price Schedule, the Specification and the Scope of Work, but the quantity of work of which is not measured in any units.

10.2 Units of Measurements

The units of measurement described in the Price Schedule are metric units.

Abbreviations used in the of Quantities are as follows:

Mm	=	millimetre	h	=	hour
M	=	metre	kg	=	kilogram
km	=	kilometre	t	=	ton (1000kg)
m2	=	square metre	no.	=	number
m2.pass	=	square metre pass	sum	=	lump sum
ha	=	hectare	MN	=	meganewton
m3	=	cubic metre	MN.m	=	meganewton-metre
m3.km	=	cubic metre-kilometre	PC sum	=	Prime Cost
sum					
l	=	litre	Prov sum	=	Provisional sum
kl	=	kilolitre	%	=	Per cent
MPa	=	megaspascal	kW	=	kilowa

10.3 Rates

- 10.3.1 This price list has columns for quantity, rate and price for the goods. Entries in these columns are made as follows:
- 10.3.2 If the Supplier is to be paid an amount for the goods which is a fixed price for an item or a fixed price for each of a series of items, the tendering supplier enters the amount in the price column only, the other two columns being left blank.
- 10.3.3 If the Supplier is to be paid an amount for the goods which is the unit rate for each item multiplied by the quantity of the item supplied, (i.e., a 'Price Schedule' arrangement) - the tendering supplier enters the rate which is then multiplied by the quantity (which has been entered either by him or by the Purchaser) to produce the price which is also entered.
- 10.3.4 If the Supplier is to be paid an amount for an item of the goods which is the rate multiplied by the quantity supplied -whatever that quantity turns out to be (i.e., a 'Schedule of rates' arrangement) - the tendering supplier enters the rate only, the other two columns being left blank. The tendering supplier's offer cannot include a total of the prices which covers all the items which the Supplier has to supply if any of the supply is dealt with using items with a rate only.
- 10.3.5 Rate only entries must not be made for work covered by other items.

CORRECTION OF ENTRIES MADE BY TENDERER

Any entry made by the Tenderer in the Price Schedule, forms, etc, which the tenderer desires to change, shall not be erased or painted out. A line shall be drawn through the incorrect entry and the correct entry shall be written above in black ink and the full signature of the Tenderer shall be placed next to the correction.

SCHEDULE 1

FIXED ASSETS REGISTER SUMMARY OF CATEGORIES @ 31 MARCH 2025

Refer to (Annexure 1 and 2)

(Values subject to change when the bid is issued)

PRICE SCHEDULE

All bidders must propose an all-inclusive, flat fee per annum, including VAT and covering all direct and indirect costs, related to the provision of short-term insurance brokerage services. FPB will not pay any additional costs once the contract is awarded.

PREMIUM SUMMARY:

Description	Annual Premium	Deductible/Excess Percentage	Minimum Amount Deductible/Excess
Vehicles/Fleet			
Windscreens			
Technical Equipment			
Computer Equipment (Including Laptops)			
Office Equipment			
SASRIA (South Africa Special Risks Insurance Association)			
Fire			
Public Liability			

ANNUAL BROKERAGE FEES

Description	Year 1	Year 2
Insurance Brokerage Fee (per annum) including VAT		
Total Brokerage Fee		
Bid value	R	

Type text here

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	RFT03 2025 2025	CLOSING DATE:	24 OCTOBER 2025	CLOSING TIME:	11:00AM
DESCRIPTION	RE-ADVERTISEMENT OF TENDER FOR APPOINTMENT OF SERVICE PROVIDER FOR PROVISION OF INSURANCE BROKER FOR A PERIOD OF 24 MONTHS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	SCM		CONTACT PERSON	SCM	
TELEPHONE NUMBER	012 003 1400		TELEPHONE NUMBER	012 003 1400	
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	tenders@fpb.org.za		E-MAIL ADDRESS	tenders@fpb.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE	(010)	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 <input type="checkbox"/> No <input type="checkbox"/>		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] Yes <input type="checkbox"/> No <input type="checkbox"/>
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES/WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
--	--	---	--

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	<input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.	

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
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, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA .
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

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

DATE:

BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

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

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

2.2.1 If so, furnish particulars:

.....

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

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication

between partners in a joint venture or consortium² will not be construed as collusive bidding.

- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

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.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the 90/10 preference point system.
- b) The applicable preference point system for this tender is the 80/20 preference point system.
- c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20	or	90/10
$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	or	$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$

Where

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

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20	or	90/10
$P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$	or	$P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

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

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

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

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

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

(Note that 80/20 will apply in this bid)

The tenderer must indicate how they claim points for each preference point system, refer to table below)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
BBBEE scored card refer to table A for guideline		9		
EME and/QSE		2		
51% women or more owned		4		
51% youth or more owned		3		
51% Owned by Persons with Disabilities		1		
Gauteng		1		
National		0		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

☐ Partnership/Joint Venture / Consortium

☐ One-person business/sole propriety

☐ Close corporation

☐ Public Company

☐ Personal Liability Company

☐ (Pty) Limited

☐ Non-Profit Company

☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

	SIGNATURE(S) OF TENDERER(S)
SURNAME AND NAME:
DATE:
ADDRESS:

Annexure A GOVERNMENT PROCUREMENT

GENERAL CONDITIONS OF CONTRACT

NOTES

The purpose of this document is to:

- (i) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (ii) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.

In this document words in the singular also mean in the plural and vice versa and words in the masculine also mean in the feminine and neuter.

- The General Conditions of Contract will form part of all bid documents and may not be amended.
- Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid (if applicable) and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

TABLE OF CLAUSES

1. Definitions
2. Application
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5. Use of contract documents and information; inspection
6. Patent rights
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General Conditions of Contract

1. Definitions

1. The following terms shall be interpreted as indicated:
 - 1.1 “Closing time” means the date and hour specified in the bidding documents for the receipt of bids.
 - 1.2 “Contract” means the written agreement entered into between the purchaser and the supplier, as recorded in the contract form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
 - 1.3 “Contract price” means the price payable to the supplier under the contract for the full and proper performance of his contractual obligations.
 - 1.4 “Corrupt practice” means the offering, giving, receiving, or soliciting of any thing of value to influence the action of a public official in the procurement process or in contract execution.
 - 1.5 "Countervailing duties" are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.
 - 1.6 “Country of origin” means the place where the goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basic characteristics or in purpose or utility from its components.
 - 1.7 “Day” means calendar day.
 - 1.8 “Delivery” means delivery in compliance of the conditions of the contract or order.
 - 1.9 “Delivery ex stock” means immediate delivery directly from stock actually on hand.
 - 1.10 “Delivery into consignees store or to his site” means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.
 - 1.11 "Dumping" occurs when a private enterprise abroad market its goods on own initiative in the RSA at lower prices than that of the country of origin and which have the potential to harm the local industries in the RSA.
 - 1.12 "Force majeure" means an event beyond the control of the supplier and not involving the supplier's fault or negligence and not foreseeable.

Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or revolutions, fires, floods, epidemics, quarantine restrictions and freight embargoes.

- 1.13 “Fraudulent practice” means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder, and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.
- 1.14 “GCC” means the General Conditions of Contract.
- 1.15 “Goods” means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.
- 1.16 “Imported content” means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well as transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.
- 1.17 “Local content” means that portion of the bidding price which is not included in the imported content provided that local manufacture does take place.
- 1.18 “Manufacture” means the production of products in a factory using labour, materials, components and machinery and includes other related value-adding activities.
- 1.19 “Order” means an official written order issued for the supply of goods or works or the rendering of a service.
- 1.20 “Project site,” where applicable, means the place indicated in bidding documents.
- 1.21 “Purchaser” means the organization purchasing the goods.
- 1.22 “Republic” means the Republic of South Africa.
- 1.23 “SCC” means the Special Conditions of Contract.
- 1.24 “Services” means those functional services ancillary to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.
- 1.25 “Written” or “in writing” means handwritten in ink or any form of electronic or mechanical writing.

Application 2.1 These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.

2.2 Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.

2.3 Where such special conditions of contract are in conflict with these general conditions, the special conditions shall apply.

General 3.1 Unless otherwise indicated in the bidding documents, the purchaser shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.

3.2 With certain exceptions, invitations to bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from www.treasury.gov.za

4. **Standards** 4.1 The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.

5. Use of contract documents and information; inspection.

5.1 The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only so far as may be necessary for purposes of such performance.

5.2 The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 5.1 except for purposes of performing the contract.

5.3 Any document, other than the contract itself mentioned in GCC clause 5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.

5.4 The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

Patent rights 6.1 The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.

7. Performance security 7.1 Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in SCC.

- 7.2 The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contract.
- 7.3 The performance security shall be denominated in the currency of the contract, or in a freely convertible currency acceptable to the purchaser and shall be in one of the following forms:
- (a) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or abroad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or
 - (b) a cashier's or certified cheque
- 7.4 The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

**8. Inspections,
tests and
analyses**

- 8.1 All pre-bidding testing will be for the account of the bidder.
- 8.2 If it is a bid condition that supplies to be produced or services to be rendered should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.
- 8.3 If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payment arrangements with the testing authority concerned.
- 8.4 If the inspections, tests and analyses referred to in clauses 8.2 and 8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.
- 8.5 Where the supplies or services referred to in clauses 8.2 and 8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.
- 8.6 Supplies and services which are referred to in clauses 8.2 and 8.3 and which do not comply with the contract requirements may be rejected.
- 8.7 Any contract supplies may on or after delivery be inspected, tested or analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with

supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchaser may, without giving the supplier further opportunity to substitute the rejected supplies, purchase such supplies as may be necessary at the expense of the supplier.

- 8.8 The provisions of clauses 8.4 to 8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 23 of GCC.

Packing

9.1 The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitation during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

9.2 The packing, marking, and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

10. Delivery and documents

10.1 Delivery of the goods shall be made by the supplier in accordance with the terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified in SCC.

10.2 Documents to be submitted by the supplier are specified in SCC.

Insurance

11.1 The goods supplied under the contract shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified in the SCC.

Transportation

12.1 Should a price other than an all-inclusive delivered price be required, this shall be specified in the SCC.

13. Incidental services

13.1 The supplier may be required to provide any or all of the following services, including additional services, if any, specified in SCC:

- (a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
- (b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
- (c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
- (d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and

- (e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

13.2 Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the parties and shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

Spare parts

14.1 As specified in SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

- (a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract; and
- (b) in the event of termination of production of the spare parts:
 - (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
 - (ii) following such termination, furnishing at no cost to the purchaser, the blueprints, drawings, and specifications of the spare parts, if requested.

Warranty

15.1 The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models, and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

15.2 This warranty shall remain valid for twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.

15.3 The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

15.4 Upon receipt of such notice, the supplier shall, within the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to the purchaser.

15.5 If the supplier, having been notified, fails to remedy the defect(s) within the period specified in SCC, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

Payment 16.1 The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.

16.2 The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfillment of other obligations stipulated in the contract.

16.3 Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.

16.4 Payment will be made in Rand unless otherwise stipulated in SCC.

Prices 17.1 Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized in SCC or in the purchaser's request for bid validity extension, as the case may be.

18. Contract amendments 18.1 No variation in or modification of the terms of the contract shall be made except by written amendment signed by the parties concerned.

Assignment 19.1 The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.

Subcontracts 20.1 The supplier shall notify the purchaser in writing of all subcontracts awarded under this contracts if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.

21. Delays in the supplier's performance 21.1 Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.

21.2 If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.

21.3 No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or a local authority.

21.4 The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.

21.5 Except as provided under GCC Clause 25, a delay by the supplier in the performance of its delivery obligations shall render the supplier liable to the imposition of penalties, pursuant to GCC Clause 22, unless an extension of time is agreed upon pursuant to GCC Clause 21.2 without the application of penalties.

21.6 Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without canceling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

Penalties

22.1 Subject to GCC Clause 25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC Clause 23.

23. Termination for default

23.1 The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:

- (a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC Clause 21.2;
- (b) if the Supplier fails to perform any other obligation(s) under the contract; or
- (c) if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

23.2 In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.

23.3 Where the purchaser terminates the contract in whole or in part, the purchaser may decide to impose a restriction penalty on the supplier by prohibiting such supplier from doing business with the public sector for a period not exceeding 10 years.

23.4 If a purchaser intends imposing a restriction on a supplier or any person associated with the supplier, the supplier will be allowed a time period of not more than fourteen (14) days to provide reasons why the envisaged restriction should not be imposed. Should the supplier fail to respond within the stipulated fourteen (14) days the purchaser may regard

the intended penalty as not objected against and may impose it on the supplier.

- 23.5 Any restriction imposed on any person by the Accounting Officer / Authority will, at the discretion of the Accounting Officer / Authority, also be applicable to any other enterprise or any partner, manager, director or other person who wholly or partly exercises or exercised or may exercise control over the enterprise of the first-mentioned person, and with which enterprise or person the first-mentioned person, is or was in the opinion of the Accounting Officer / Authority actively associated.
- 23.6 If a restriction is imposed, the purchaser must, within five (5) working days of such imposition, furnish the National Treasury, with the following information:
- (i) the name and address of the supplier and / or person restricted by the purchaser;
 - (ii) the date of commencement of the restriction
 - (iii) the period of restriction; and
 - (iv) the reasons for the restriction.

These details will be loaded in the National Treasury's central database of suppliers or persons prohibited from doing business with the public sector.

- 23.7 If a court of law convicts a person of an offence as contemplated in sections 12 or 13 of the Prevention and Combating of Corrupt Activities Act, No. 12 of 2004, the court may also rule that such person's name be endorsed on the Register for Tender Defaulters. When a person's name has been endorsed on the Register, the person will be prohibited from doing business with the public sector for a period not less than five years and not more than 10 years. The National Treasury is empowered to determine the period of restriction and each case will be dealt with on its own merits. According to section 32 of the Act the Register must be open to the public. The Register can be perused on the National Treasury website.

**24. Anti-dumping
and countervailing
duties and rights**

- 24.1 When, after the date of bid, provisional payments are required, or anti-dumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favourable difference shall on demand be paid forthwith by the contractor to the State or the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or rendered, or is to deliver or render in terms of the contract or any other contract or any other amount which may be due to him

**25. Force
Majeure**

- 25.1 Notwithstanding the provisions of GCC Clauses 22 and 23, the supplier shall not be liable for forfeiture of its performance security,

damages, or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

- 25.2 If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by the purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

**26. Termination
for insolvency**

- 26.1 The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will not prejudice or affect any right of action or remedy which has accrued or will accrue thereafter to the purchaser.

**27. Settlement of
Disputes**

- 27.1 If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.
- 27.2 If, after thirty (30) days, the parties have failed to resolve their dispute or difference by such mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.
- 27.3 Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.
- 27.4 Mediation proceedings shall be conducted in accordance with the rules of procedure specified in the SCC.
- 27.5 Notwithstanding any reference to mediation and/or court proceedings herein,
- (a) the parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
 - (b) the purchaser shall pay the supplier any monies due the supplier.

**28. Limitation of
liability**

- 28.1 Except in cases of criminal negligence or willful misconduct, and in the case of infringement pursuant to Clause 6;
- (a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss of use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and

- (b) aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

29. Governing language

- 29.1 The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.

30. Applicable law

- 30.1 The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.

Notices

31.1 Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice

31.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice.

32. Taxes and duties

- 32.1 A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.
- 32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.
- 32.3 No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.

33. National Industrial Participation (NIP) Programme

- 33.1 The NIP Programme administered by the Department of Trade and Industry shall be applicable to all contracts that are subject to the NIP obligation.

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