TALETSO TVET COLLEGE

TENDER INVITATION FOR

APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF BROKERAGE SERVICES FOR A PERIOD OF THIRTY-SIX (36) MONTHS

TENDER NO: TT 01/07/2026

Prospective suppliers who are interested in participating in the aforementioned tender are invited to submit a proposal in full compliance to the requirement of this tender document.

CLOSING DATE AND TIME FOR SUBMISSION OF TENDER DOCUMENTS:

Tender number	**TT 01/07/2026**
Date issued	**08/07/2026**
Tender closing date	**30/07/2026 (Thursday) Time: 11:00 AM** **Tender Submission will be at the following address:** Taletso TVET College Central office 6 DF Malan Ave Libertas Mahikeng 2745
Banking details	**Account Holder : Taletso Tvet College** **Bank : ABSA** **Account No :4056643987** **Reference :Bid No and Company name**
Compulsory Information Session	**Not Applicable**

Company Name		
Address		
Contact person	Mr/Mrs/Ms/Dr/Prof.	
Contact numbers	(w)	(cell)
Email address		

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1. INTRODUCTION

1.1 OVERVIEW

1.1.1 WHAT DOES TALETSO TVET COLLEGE AIM TO DO?

A. BACKGROUND

Taletso Technical and Vocational Education and Training (TVET) College is a public institution established in terms of the Further Education and Training Colleges Act, No. 16 of 2006, and operates under the Department of Higher Education and Training (DHET) within the Post-School Education and Training (PSET) framework. The College operates through three (3) campuses, namely Mahikeng, Lichtenburg, and Lehurutshe, which are strategically located within the Ngaka Modiri Molema District Municipality in the North West Province.

Taletso TVET College is committed to delivering quality technical and vocational education and training while ensuring sound governance, financial sustainability, and effective risk management across all campuses and operations.
The College seeks to safeguard its movable and immovable assets, employees, students, and operational activities through comprehensive insurance and risk management solutions.

B. PURPOSE OF THE ASSIGNMENT

The purpose of this specification is to outline the scope of work, deliverables, evaluation criteria, and compliance requirements for the appointment of a suitably qualified, accredited, and experienced service provider to render comprehensive Brokerage Services to the College for a period of thirty-six (36) months.

The appointed broker shall provide professional insurance brokerage services covering all College assets, student insurance, and insurance advisory services. In addition, the service provider shall conduct Occupational Health and Safety (OHS) assessments, facilitate insurance and risk management training, and provide strategic advice on insurance risk mitigation to ensure that the College maintains adequate and cost-effective insurance cover at all times.

Furthermore, the appointed broker shall undertake comprehensive assessments of the College's infrastructure, buildings, equipment, and other insurable assets to determine their compliance with applicable legislative, regulatory, insurer, safety, fire protection, electrical, occupational health and safety, and other insurance underwriting requirements. The assessment shall identify compliance gaps, potential insurance risks, and areas requiring corrective action that may adversely affect the validity of insurance policies or result in the rejection or reduction of insurance claims.

The broker shall provide detailed compliance reports together with practical recommendations and implementation plans to assist the College in maintaining continuous compliance with all relevant legislation, standards, and insurer requirements. The objective is to strengthen the College's risk management framework, improve asset protection, minimise uninsured risks, and ensure that insurance claims are processed and paid without unnecessary delays or repudiation arising from non-compliance with applicable statutory, regulatory, or policy conditions.

C. SCOPE OF WORK

The service provider will perform, but not be limited to, the following key activities:

- Provision of insurance brokerage services for all College assets including buildings, vehicles, and equipment.
- Administration and facilitation of student insurance covering injuries, medical emergencies, accidental death benefits
- Conducting Occupational Health and Safety (OHS) assessments at all College sites.
- Providing training and awareness programmes on insurance risk management and mitigation.
- Liaising with insurers to ensure cost-effective and comprehensive cover aligned with College needs.
- Assisting the College in claim management, renewals, and policy reviews.

Deliverables

The service provider will be required to deliver the following:

- Comprehensive insurance portfolio report for the College.
- Annual OHS assessment reports for each site.
- Training materials and attendance registers for insurance risk training sessions.
- Quarterly and annual performance reports detailing claims, renewals, and policy updates.

1.1.2 WHAT IS TALETSO TVET COLLEGE LOOKING FOR?

Taletso TVET College is seeking to appoint a suitably qualified that is duly registered and authorised by the Financial Sector Conduct Authority (FSCA), experienced, and reputable professional insurance broker to provide comprehensive insurance brokerage and risk advisory services to the College.

The appointed broker will be expected to assist the College in identifying, assessing, and mitigating insurable risks, ensuring adequate insurance cover for all college assets, liabilities, and operational activities, student insurance, Occupational Health and Safety (OHS) assessments, and training on insurance risk management. The broker must demonstrate the ability to provide strategic insurance advice, efficient claims management, policy administration, and cost-effective insurance solutions tailored to the College’s needs.

The College is specifically looking for a service provider with:

- Proven experience in insurance brokerage and risk management services.
- Strong knowledge of the public sector regulatory and compliance environment.
- Capacity to manage a diverse insurance portfolio.
- Ability to negotiate competitive premiums and favourable policy terms.
- Efficient claims handling and dispute resolution capabilities.
- Commitment to professional, responsive, and high-quality service delivery.

1.1.3 SUMMARY OF KEY MATTERS FOR CONSIDERATION BY POTENTIAL SUPPLIERS

Key matters for consideration by Suppliers include:

a) The appointment period for the successful bidder will be thirty-six (36) months, subject to satisfactory performance and continued need for the service.
b) Preference points will be allocated and evaluated in accordance with applicable procurement legislation, including the Preferential Procurement Policy Framework Act (PPPFA) and other relevant regulatory prescripts in force at the time of evaluation.
c) Bidders must comply with and meet all mandatory administrative, functionality, and compliance requirements as stipulated in the tender document.
d) Failure to submit all required supporting documentation, certificates, declarations, or schedules by the closing date and time may result in disqualification from further evaluation.
e) Bidders must ensure that all information provided in their submissions is true, accurate, complete, and verifiable. Any misrepresentation or false declaration may lead to disqualification or contract termination.
f) Late submissions, incomplete bids, or bids submitted through non-approved channels will not be considered.
g) The College reserves the right to request additional information, conduct due diligence, verify references, and assess the bidder's capacity to deliver the required services.
h) Bidders may be required to demonstrate relevant experience, technical capability, financial stability, and the availability of qualified personnel to execute the contract successfully.
i) Submission of a bid does not guarantee appointment, and all costs associated with preparing and submitting the tender shall be for the bidder's own account.
j) Taletso TVET College reserves the right to accept or reject any bid, wholly or in part, or not to make any appointment, should it be deemed in the best interest of the College to do so

1.2 PURPOSE AND OBJECTIVE OF THE TENDER

1.2.1 PURPOSE

The purpose of this tender is to identify and appoint a suitably qualified and experienced insurance brokerage service provider to manage Taletso TVET College's insurance portfolio and related risk management requirements. The objective is to ensure comprehensive insurance coverage, effective claims management, proactive risk mitigation, and cost-effective insurance solutions that protect the College's assets, operations, and liabilities.

1.2.2 HOW AGREEMENT IS TO BE FORMED

Responses to this tender will form the basis for any agreements reached and such responses will represent a firm offer by the Supplier to agree to supply these services to Taletso TVET College as detailed in the pricing table proposed (see **Appendix A).**

1.3 EVALUATION CRITERIA

1.3.1 OBJECTIVE

The objective of the evaluation process is to identify the bidder that offers the best overall value to Taletso TVET College, taking into account a balanced assessment of technical capability, pricing competitiveness, regulatory compliance, and transformation objectives. The process is designed to ensure the appointment of a competent and experienced service provider capable of delivering efficient, cost-effective, and reliable insurance brokerage services that align with the College's operational and risk management needs.

The evaluation will further ensure that the selected bidder demonstrates sound professional expertise, adequate resources, and a proven track record in delivering similar services within the public sector, while also promoting broad-based economic empowerment in line with applicable procurement legislation and institutional policies.

1.3.2 TOTAL COST

"Total Costs" will be an important parameter for Supplier assessment. "Total Costs" is defined as follows:

"Total Costs" means the sum of all direct and indirect costs associated with the purchase of the services incurred by Taletso TVET College, including but not limited to the invoice price, services life, service maintenance costs, distribution costs, transaction costs, inventory costs, purchasing administration costs and other costs incurred with the use of these services provided by the Supplier."

Suppliers can reduce Total Costs through one or more of the following approaches:

a) Lowering prices for the services;
b) Lowering logistic costs;
c) Increasing value from service and support; and/or
d) Offering superior service performance.

Suppliers are expected to provide highly competitive pricing - pricing reserved for their largest and most important account - both at the outset of the relationship and on an on-going basis. Taletso TVET College expects to work with Supplier(s) to continuously identify opportunities to reduce Total Costs.

1.3.3 COST TRANSPARENCY

Taletso TVET College desires to achieve clarity on the costs of all aspects of the supply of the services. The details requested in this bid are intended to deliver the required level of transparency. Any gaps in Supplier responses will be interpreted as an unwillingness to participate with Taletso TVET College in the desired relationship and will seriously disadvantage the Supplier.

1.3.4 SUPPLIER CAPABILITY

Taletso TVET College will make an assessment of Supplier capability on the basis of Taletso TVET College's experience and information provided by Suppliers in response to this Bid.

1.3.5 ADDITIONAL INITIATIVES

Suppliers are encouraged to be creative and develop suggestions to enhance Supplier relationships, quality, and service levels that will be cost effective for Taletso TVET College. These suggestions may lead Taletso TVET College to promote options for new services.

1.3.6 EMPOWERMENT

Taletso TVET College is serious in its commitment to the previously disadvantaged groups and will expect selected Suppliers to demonstrate that they share that commitment. Accordingly, a B-BBEE Certificate in terms of the Codes of Good Practice issued by an accredited rating agency must be submitted.

Preference will be given to bidders in accordance with the empowerment objectives and specific goals as prescribed by applicable legislation and applicable procurement policies of Taletso TVET College. These objectives may include, but are not limited to, advancing Broad-Based Black Economic Empowerment (B-BBEE), promoting participation of historically disadvantaged individuals, and supporting the development of small, medium, and micro enterprises (SMMEs).

Bidders are required to submit valid and verifiable B-BBEE certificates or sworn affidavits, as applicable, to substantiate their empowerment status. Evaluation of empowerment will form part of the overall bid scoring in line with the prescribed preference point system and applicable regulatory frameworks.

2. GUIDELINES FOR SUBMISSION OF BID

2.1 BIDDING TERMS

All bids submitted to Taletso TVET College must comply with the terms, conditions, and requirements set out in this tender document. Bidders are responsible for ensuring that their submissions are complete, accurate, and submitted in the prescribed format before the specified closing date and time.

The following bid terms shall apply:

- All bid responses must be submitted in accordance with the instructions contained in this tender document.
- The bidder shall bear all costs associated with the preparation and submission of the bid.
- Late submissions will not be accepted or considered for evaluation.
- Incomplete bids or bids with missing mandatory documents may be disqualified.
- All prices quoted must be in **South African Rand (ZAR)** and must include all applicable taxes, duties, and related costs.
- Bid submissions shall remain valid for a period specified by the College from the closing date of the tender.
- Any attempt to influence the bid evaluation process may result in immediate disqualification.
- The College reserves the right to accept or reject any bid, wholly or partially, and is not bound to accept the lowest or any bid received.

2.1.1 ACCEPTANCE OF PROPOSAL AT TALETSO TVET COLLEGE'S DISCRETION

The acceptance of any bid submitted in response to this tender shall be entirely at the discretion of Taletso TVET College. The College is not obliged to accept the lowest-priced bid or any bid received and reserves the right to award the tender in whole or in part, based on what is deemed to be in the best interests of the College.

The College further reserves the right to reject any or all bids, cancel or withdraw the tender process at any stage, or negotiate with one or more bidders where permissible under applicable procurement legislation and internal policies. Submission of a bid does not create any contractual obligation on the part of the College until a formal written agreement has been concluded and signed by both parties.

2.1.2 CONFORMANCE

All bids submitted to Taletso TVET College must conform strictly to the specifications, requirements, terms, and conditions set out in this tender document. Bidders are required to ensure that their submissions fully address all mandatory requirements and provide all requested information and supporting documentation.

Failure to comply with the prescribed bid requirements, submission instructions, or mandatory compliance criteria may result in the bid being deemed non-responsive and disqualified from further evaluation. The College reserves the right to verify the accuracy of all information submitted and to request clarification where necessary.

2.1.3 COVERAGE

The successful bidder shall be required to provide comprehensive insurance brokerage services covering all insurance-related needs of Taletso TVET College, including but not limited to asset protection, liability coverage, risk advisory services, policy administration, and claims management.

The scope of coverage must ensure that the College's movable and immovable assets, operational activities, personnel-related exposures, and other insurable risks are adequately identified, assessed, and protected through appropriate insurance solutions. The appointed service provider must continuously review coverage to ensure relevance, adequacy, and alignment with the College's evolving risk profile.

2.1.4 REQUIREMENTS FOR ADDITIONAL INFORMATION

Taletso TVET College reserves the right, at any stage of the tender evaluation process, to request additional information, supporting documentation, or clarification from bidders in order to verify the accuracy and completeness of submitted bids.

Bidders shall provide the requested information within the timeframe specified by the College. Failure to submit the required additional information or to respond adequately to requests for clarification may result in the bid being deemed non-responsive and may lead to disqualification from further consideration.

2.1.5 COSTS

Taletso TVET College is not responsible for any costs (whether direct or indirect) incurred by a Supplier in preparing and/or submitting the bid. All costs and expenses incurred by bidders in the preparation, compilation, and submission of their bids shall be for their own account and shall not be recoverable from Taletso TVET College under any circumstances

2.1.6 SUBMISSION VALIDITY

All bid submissions made to Taletso TVET College shall remain valid and binding for a period of **ninety (90) calendar days** from the official tender closing date, unless otherwise stated in the tender document.

2.1.7 SUPPLIER'S ACCEPTANCE OF TERMS & CONDITIONS

By submitting a bid in response to this tender, the bidder acknowledges that they have read, understood, and accepted all the terms, conditions, specifications, and requirements contained in this tender document issued by Taletso TVET College.

Submission of a bid shall constitute the bidder's unconditional acceptance of these terms and conditions, unless specific deviations or qualifications are clearly disclosed in writing and accepted by the College. Failure to comply with the prescribed terms and conditions may result in disqualification or termination of the agreement if appointed.

2.2 PRICING TRANSPARENCY

All bidders must provide clear, complete, and transparent pricing for the services offered to Taletso TVET College. Pricing submissions must clearly indicate all commissions, brokerage fees, administrative charges, professional service fees, and any other costs associated with the provision of insurance brokerage services.

All quoted prices must be stated in **South African Rand (ZAR)** and must include all applicable taxes, levies, and related charges unless otherwise stated. The College reserves the right to seek clarification on any pricing discrepancies, omissions, or unclear cost structures to ensure fair and accurate evaluation of all bids.

2.3 COLLEGE REPRESENTATIVE

All contact and questions with regard to this bid must be made through the College representative.

For the purpose of the Bid, the Taletso TVET College representative

Contact Person	
Name & Surname	Mr S Nkuna
Telephone number	(018) 384 2341
E-mail address	Nkuna.s@taletso.edu.za

2.4 QUESTIONS AND CLARIFICATIONS

All questions regarding this bid must be directed to the College Representative by email. Questions must not be submitted by telephone. The College will only accept written enquiries submitted by email.

All enquiries, questions, or requests for clarification relating to this tender must be submitted in writing to Taletso TVET College via the designated contact details provided in the tender document. No verbal enquiries will be considered binding or used to alter the tender requirements.

Bidders must ensure that all requests for clarification are submitted within the stipulated timeframes outlined in the tender schedule. Responses to questions received may, where necessary, be communicated to all prospective bidders to ensure transparency and fairness in the procurement process.

Answers to all questions will be e-mailed to all Suppliers who have been provided with this Bid

All questions must include:

a) The Supplier's name and address;
b) A reference to the specific section and page number of the RFP; and
c) The contact name, telephone number and e-mail address

2.5 BID FORMAT

All bid submissions to Taletso TVET College must be prepared and presented in a clear, structured, and professional format to facilitate efficient evaluation. Bidders are required to ensure that their submissions are organised in accordance with the sequence and requirements outlined in this tender document.

The bid must include a properly indexed table of contents and be divided into clearly labelled sections, including but not limited to: administrative compliance documents, technical proposal, pricing schedule, and supporting annexures. All pages must be numbered consecutively.

Bidders must ensure that all mandatory forms are fully completed, signed where required, and submitted in the prescribed format. Any deviation from the required bid format, omission of key documents, or disorganised submission may result in the bid being deemed non-responsive and disqualified from further evaluation.

2.6 DELIVERY INSTRUCTIONS

All Bidders must submit their responses in the following format:

Completed documents with all attachments must be signed and submitted to the following address:

Taletso TVET College
Central office
6 DF Malan Ave
Libertas
Mahikeng
2745

Closing date: 30 July 2026
Time: 11h00 am

All Suppliers must submit their responses in the following format:

Description of Appendix	***Requirement***	***Circle yes if submitted***	
Tender Document	Each page of the tender document to be **initialled** by a delegated representative	Yes	No
Completed technical pricing	Submit a completed pricing schedule in **Appendix A** – Pricing Schedule.	Yes	No
Proof of Bank Account	Stamped letter from bank (not older than 6 months)	Yes	No
Proof of Payment	Proof of tender document purchase.	Yes	No

Company registration documents	Company registration documents/CK (CIPC)	Yes	No
ID Copies of directors	Certified & not older than 6 months	Yes	No
SARS	Valid Tax clearance certificate/ Tax pin	Yes	No
Proof of address	Proof of address (e.g. Municipal letter/lease agreement /traditional authority letter)	Yes	No
Fully complete SBD forms	SBD 4, 6.1, 8 and 9 forms	Yes	No
Registration National Treasury (CSD)	Provide a copy of the full report of registration on National Treasury Central Supplier Database.	Yes	No
Financial Sector Conduct Authority (FSCA)	Submit registration with the Financial Sector Conduct Authority (FSCA)	Yes	No
Financial Intermediaries Association Membership (FIA)	Submit registration with the Financial Intermediaries Association Membership (FIA)	Yes	No
2 years annual financial statements	Annual financial statements (Signed by Member/Director and Accounting Officer/Auditor or reviewer) depending on type of company	Yes	No
Letter of Good Standing	Valid COIDA Letter of Good Standing	Yes	No
Company Profile	Company profile detailing the firm's background, ownership, organisational structure, areas of expertise, and experience in providing brokerage and insurance advisory services.	Yes	No
Submission of Electronic Copies (USB Drive Requirement)	Bidders must submit a USB containing scanned PDF copies of all tender documents. The USB must match the hard copy submission. Failure to include a complete USB version may result in the bid being deemed non-responsive.	Yes	No

2.7 ADDITIONAL SUPPLIER INFORMATION

Bidders submitting proposals to Taletso TVET College may be required to provide additional information to support the evaluation of their capability, experience, and compliance with the tender requirements. Such information may include, but is not limited to, company profiles, proof of previous experience, client references, financial statements, key personnel qualifications, and organisational capacity.

The College reserves the right to request further clarification, conduct due diligence, or seek verification of any information submitted by the bidder. All requested additional information must be provided within the timeframe specified by the College. Failure to comply with such requests may result in the bid being deemed non-responsive or disqualified from further consideration.

2.8 ACKNOWLEDGMENTS AND DISCLAIMERS

Bidders submitting proposals to Taletso TVET College acknowledge and accept the disclaimers set out below, which govern the tender process.

2.8.1 NON-BINDING

This invitation to bid does not constitute an offer or a contract between Taletso TVET College and any bidder. The issuance of this tender document does not create any obligation on the part of the College to award a contract to any bidder, nor does it entitle any bidder to claim any form of compensation or reimbursement.

The College reserves the right, at its sole discretion, to accept or reject any bid, to cancel the tender process at any stage, or to re-advertise the tender without incurring any liability whatsoever to any bidder. Submission of a bid shall therefore be at the bidder's own risk and expense.

2.8.2 ACCURACY OF INFORMATION

Bidders submitting proposals to Taletso TVET College are solely responsible for ensuring that all information provided in their bid submissions is true, accurate, complete, and not misleading in any respect.

The College reserves the right to verify any information submitted by bidders through independent sources or requests for additional supporting documentation. Any misrepresentation, falsification, omission of material facts, or provision of inaccurate information may result in immediate disqualification of the bid, withdrawal of any award made, or termination of any resulting contract, without prejudice to any other rights that Taletso TVET College may have.

2.8.3 NEGOTIATIONS

Taletso TVET College reserves the right to enter into negotiations with one or more bidders after the evaluation process, should it be deemed necessary and in the best interest of the College. Such negotiations may relate to pricing, scope of services, contractual terms, service level expectations, or any other relevant aspects of the bid.

2.8.4 TALETSO TVET COLLEGE'S USE OF INFORMATION

All information submitted by bidders to Taletso TVET College in response to this tender shall become part of the College's official records and may be used for the purposes of evaluation, adjudication, auditing, and reporting in accordance with applicable procurement legislation and institutional policies.

The College shall treat all submitted information with due care and confidentiality; however, it may disclose such information where required by law, audit processes, regulatory authorities, or any competent oversight body. Submission of a bid constitutes consent by the bidder for the College to utilise and retain the information provided for purposes directly related to the tender process and any resulting contractual obligations.

2.8.5 INFORMATION PROVIDED BY TALETSO TVET COLLEGE

Any information, documentation, or data provided by Taletso TVET College as part of this tender process is supplied solely for the purpose of enabling bidders to prepare and submit their proposals. Such information remains the property of the College and may not be used for any purpose other than responding to this tender.

2.8.6 SUPPLIER'S ACKNOWLEDGMENTS

In submitting this bid, the Supplier acknowledges and agrees that:

a) By submitting a bid to Taletso TVET College, the bidder confirms that they have read, understood, and fully accepted all terms, conditions, requirements, and disclaimers contained in this tender document.The bidder further acknowledges that they have satisfied themselves with all aspects of the tender, including scope of work, pricing requirements, compliance obligations, and any risks associated with the provision of the required services. Submission of a bid shall constitute a binding declaration that the bidder is willing and able to perform the services in accordance with the specifications provided should they be appointed.

b) The Information has been independently verified and Taletso TVET College, all other Associates of Taletso TVET College and its and their respective directors, officers, advisers, employees and agents, are not under any liability, whether arising from negligence or otherwise, for any representation contained in it or any omission from it or for any error, inaccuracy, incompleteness or other defect in the Information it contains.

c) This bid contains representations and other statements concerning requirements for the supply of the services. No representation, statement or warranty, express or implied, is made by Taletso TVET College, any other Associate of Taletso TVET College or its and their respective directors, officers, advisers, employees or agents that any statement, estimate or evaluation contained in it will prove correct. The Supplier relies solely on its own investigations and inquiries in respect of Taletso TVET College's requirements for the services and the accuracy of the Information.

d) Without limitation to the above, none of Taletso TVET College, or any other Associate of Taletso TVET College, nor any person purporting to act on behalf of Taletso TVET College, or any other Associate Taletso TVET College, will be liable in any way for any losses or liabilities incurred by a Supplier or any other person (including, without limitation, damages, costs, loss of profits or consequential or indirect losses) arising from any cause whatsoever including, without limitation, any error, inaccuracy, incompleteness or other defect in the Information.

e) The Supplier also acknowledges that Taletso TVET College, without liability or recourse, may at any time without notice:

f) Enter into and conclude negotiations with any other Supplier for the supply of part or all of Taletso TVET College's requirements of the services;

g) Terminate the bid process in respect of any or all of Taletso TVET College's requirements;

h) Terminate discussions or negotiations with the Supplier or otherwise terminate the Supplier's further participation in this bid

i) Reject any bid submitted by the Supplier; and/or

2.8.7 PUBLIC ANNOUNCEMENTS

Upon conclusion of the evaluation and adjudication process, Taletso TVET College may publicly announce the outcome of the tender, including the name of the successful bidder, in accordance with applicable procurement legislation and transparency requirements.

Such announcement may be made through official College communication channels, notices, or other platforms deemed appropriate by the College. Bidders acknowledge that submission of a bid constitutes consent for the College to disclose the outcome of the tender process, where required, and that no bidder shall have any claim against the College in respect of such disclosure.

3. SUPPLIER CAPABILITY

3.1 SECURITY OF SUPPLY

Bidders submitting proposals to Taletso TVET College must demonstrate the ability to provide continuous, reliable, and uninterrupted insurance brokerage services for the duration of the contract period. This includes the capacity to maintain adequate operational resources, skilled personnel, and systems to ensure consistent service delivery.

The appointed service provider must have robust contingency arrangements in place to mitigate any potential disruptions in service, including but not limited to staff shortages, system failures, or changes in insurer arrangements. The bidder must further demonstrate strong relationships with reputable insurers to ensure ongoing access to suitable insurance products and competitive market options.

4. PROPOSED PRICING

4.1 INTRODUCTION

This section outlines the requirements for the submission of proposed pricing by bidders responding to this tender issued by Taletso TVET College. The pricing proposal must clearly and comprehensively reflect all costs associated with the provision of insurance brokerage services for the duration of the contract period.

Bidders are required to ensure that their pricing structure is transparent, competitive, and aligned with the scope of services specified in this tender document. The pricing submitted will form a key component of the evaluation process and will be assessed in conjunction with technical capability, compliance, and empowerment objectives to determine overall value for money.

4.2 PRICING TABLE – INSTRUCTIONS – PRICE AS PER DESIRED LAYOUT

The responses must remain in the format outlined in the instructions of **Appendix A**, which contain the technical and pricing information.

Please note that all the prices reflected in Appendix A shall be:

a) Inclusive of Value Added Tax (which shall be payable by the Member subject to the receipt of a VAT invoice); and

b) Inclusive of all associated costs and taxes, including insurance, charges for packaging, shipping, carriage, delivery to the premises, handling fees, toll fees, permits, all duties, licenses and other related charges payable in respect of the service from time to time.

4.3 PRICING TABLE, SPECIFICATION AND ESTIMATED VOLUME/ QUANTITY

Taletso TVET College has included specification and estimated volumes/quantity (**Appendix A where applicable**) as a guideline to assist suppliers in pricing. Separate detailed pricing schedule and/ or bill of quantities may be attached. The volume is an estimate and should not be interpreted as a guarantee in any way.

4.4 DOUBLE COUNTING

In order to assess your prices fairly (and prevent "double counting") do not include costs which are explicitly asked for in other columns or spread sheets.

5. PRICING

Tenderers are required to submit a price proposal as stipulated in **Appendix A**.

5.1 PAYMENT TERMS

Payment terms are within **30 days of the date of invoice**.

5.2 CONTRACT LENGTH

Contract duration is **thirty-six (36**) months from the date of appointment.

Taletso TVET College requires a ***full-risk contract*** arrangement. Application for a price increase will only be considered if submitted with written proof that it is due to circumstances beyond the control of the supplier.

6. REQUIRED BID LAYOUT

In order to facilitate a structured evaluation of the submissions resulting from this bid, Taletso TVET College requires each supplier to conform to a specific bid layout. Deviation from this required document structure may result in disqualification.

6.1 GENERAL NOTES:

a) A cover page per **Appendix** is included in this document and Supplier must ensure that these cover pages are used in their submissions.
b) Each **Appendix** cover will contain a list of the required information and / or documents that need to be included in that section. The list has a check box for the supplier to indicate that the information requested has been included.
c) Each **Appendix** cover page is to be signed by the duly authorized representative of the Supplier.

7. TECHNICAL SPECIFICATION

Taletso TVET College has included Pricing schdule.in **Appendix A**

8. EVALUATION PROCESS

8.1 AIM OF EVALUATION

To ensure that all proposals received are afforded the opportunity to compete equally and enable Taletso TVET College a chance to evaluate the tender received in fair and unbiased manner, as per pre – described process of evaluating proposals.

8.2 EVALUATION CRITERIA

The evaluation criteria as set out hereunder will assist Taletso TVET College to ensure conformity to all tender requirements. Taletso TVET College's evaluation team shall use the evaluation criteria, weights, applicable values and / or minimum qualifying score for functionality as indicated in the tender document. The evaluation criteria can be discussed and clarified with all attendees at the compulsory information session, where applicable, as an aid to prepare for such evaluation.

The set evaluation criteria shall be used as a guideline, but not limited to the following process:

8.2.1 PRE-QUALIFICATION/MANDATORY INFORMATION REQUIREMENT

The Pre-qualification/Mandatory Information Requirement phase validates the tenderers' compliance with the legal requirements to conduct business in SA, as well as to specific industry requirement for the supply of services where applicable.

Please see table below for the list of mandatory requirements and tick yes if documentation is submitted and no if not submitted.

Description of Appendix	***Requirement***	***Circle yes if submitted***	
Tender Document	Each page of the tender document to be **initialled** by a delegated representative	Yes	No
Completed technical pricing	Submit a completed pricing schedule in **Appendix A** – Pricing Schedule.	Yes	No
Proof of Bank Account	Stamped letter from bank (not older than 6 months)	Yes	No
Proof of Payment	Proof of tender document purchase. **(Refer to Advert & Cover page of this document for banking details)**	Yes	No
Company registration documents	Company registration documents/CK (CIPC)	Yes	No
ID Copies of directors	Certified & not older than 6 months	Yes	No
SARS	Valid Tax clearance certificate/ Tax pin	Yes	No
Proof of address	Proof of address (e.g. Municipal letter/lease agreement /traditional authority letter)	Yes	No
Fully complete SBD forms	SBD 4, 6.1, 8 and 9 forms	Yes	No
Registration National Treasury (CSD)	Provide a copy of the full report of registration on National Treasury Central Supplier Database.	Yes	No
Financial Sector Conduct Authority (FSCA)	Submit registration with the Financial Sector Conduct Authority (FSCA)	Yes	No
Financial Intermediaries Association Membership (FIA)	Submit registration with the Financial Intermediaries Association Membership (FIA)	Yes	No
Letter of Good Standing	Valid COIDA Letter of Good Standing	Yes	No
Company profile	Company profile detailing the firm's background, ownership, organizational structure, areas of expertise, and experience in providing brokerage and insurance advisory services.	Yes	No

2 years annual financial statements	Annual financial statements (Signed by Member/Director and Accounting Officer/Auditor or reviewer) depending on type of company	Yes	No
Submission of Electronic Copies (USB Drive Requirement)	Bidders must submit a USB containing scanned PDF copies of all tender documents. The USB must match the hard copy submission. Failure to include a complete USB version may result in the bid being deemed non-responsive.	Yes	No

NB: No points will be allocated to this phase; however, tenders that do not meet the pre-qualification requirements will not advance to the next phase of the evaluation process.

8.2.2 STAGE 1: EVALUATION OF FUNCTIONALITY

The evaluation criterion for functionality aims to assess the capability of the tenderer to execute and maintain a tender and/ or contract. Tenderers need to obtain a minimum percentage score of 70% and above in order to progress to the next stage of evaluation.

FUNCTIONALITY CRITERIA	POINTS ALLOCATED
Previous Experience (Four (4) Contactable reference letters where similar projects have been executed) • 4 reference Letters = 40 Points • 3 reference Letters = 30 Points • 2 reference Letters = 20 Points • 1 reference Letter = 10 Points The reference letter(s) must be on the letterhead of the previously serviced client, should at least reflect the name of the client, title of the related work conducted, year conducted and completed, contactable reference, and signed by the appropriate delegate. The Reference Letter must indicate the quality of the service rendered	**40**
Experience of Key Personnel Service Providers must demonstrate that they possess relevant Brokerage and advisory services competencies to successfully provide the required services within the financial risk management environment. **Attach a concise CV with contactable references. (For the Engagement Director)** • More than **8 – 10 years'** experience with associate membership IISA = **30 Points** • More than **5 – 7 years'** experience with associate membership of IISA = **20 Points** • More than **1 – 4 years'** experience with associate membership of IISA = **10 Points** **(NB - IISA is Insurance institute of South Africa)**	**30**
Submit statement methodology Comprehensive Methodology that covers the scope of work, highlights techniques that will be employed for the project, this must include the approach and alignment to best practice. • Methodology addressing the entire scope of work =20 Points • Methodology addressing partial scope of work =10 Points • Methodology not addressing the scope of work =0 Points	**20**
Audited Financial Statements / Financial Capacity Audited Financial Statements or independently reviewed financial statements for the last two (2) financial years reflecting a financially stable business = 10 points No audited/reviewed financial statements submitted **=** 0 points	10
Total points	**100**

Please include reference letters for all your clients in the table below.
Kindly complete the table below for references.

FUNCTIONALITY CRITERIA.

REFERENCE ONE (1)

COMPLETE TABLE IN FULL BELOW (COMPULSORY)

Reference Company One (1) Name of Company:		Contact Name:	
Contact e-Mail:		Contact Telephone:	
Description of Contract:			
Contract Details			
1	Contract Value:		
2	Contract Commencement date:		
3	Contract Completion Date:		
4	Contract Duration:		
Attach Reference Letter 1 Note: References to be in the letterhead of the company that is making the reference.			

FAILURE TO PROVIDE RELEVANT PROOF WILL RESULT IN ZERO POINT ALLOCATION

FUNCTIONALITY CRITERIA

REFERENCE TWO (2)

COMPLETE TABLE IN FULL BELOW (COMPULSORY)

Reference Company Two (2) Name of Company:		Contact Name:	
Contact e-Mail:		Contact Telephone:	
Description of Contract:			
Contract Details			
1	Contract Value:		
2	Contract Commencement date:		
3	Contract Completion Date:		
4	Contract Duration:		
Attach Reference Letter 2 Note: References to be in the letterhead of the company that is making the reference.			

FAILURE TO PROVIDE RELEVANT PROOF WILL RESULT IN ZERO POINT ALLOCATION

FUNCTIONALITY CRITERIA

REFERENCE THREE (3)

COMPLETE TABLE IN FULL BELOW (COMPULSORY)

Reference Company Three (3) Name of Company:		Contact Name:	
Contact e-Mail:		Contact Telephone:	
Description of Contract:			
Contract Details			
1	Contract Value:		
2	Contract Commencement date:		
3	Contract Completion Date:		
4	Contract Duration:		
Attach Reference Letter 3 Note: References to be in the letterhead of the company that is making the reference.			

FAILURE TO PROVIDE RELEVANT PROOF WILL RESULT IN ZERO POINT ALLOCATION

FUNCTIONALITY CRITERIA

REFERENCE FOUR (4)

COMPLETE TABLE IN FULL BELOW (COMPULSORY)

<table>
<tr><td colspan="2">Reference Company Four (4)
Name of Company:</td><td></td><td>Contact Name:</td><td></td></tr>
<tr><td colspan="2">Contact e-Mail:</td><td></td><td>Contact Telephone:</td><td></td></tr>
<tr><td colspan="2">Description of Contract:</td><td colspan="3"></td></tr>
<tr><td colspan="5">Contract Details</td></tr>
<tr><td>1</td><td>Contract Value:</td><td colspan="3"></td></tr>
<tr><td>2</td><td>Contract Commencement date:</td><td colspan="3"></td></tr>
<tr><td>3</td><td>Contract Completion Date:</td><td colspan="3"></td></tr>
<tr><td>4</td><td>Contract Duration:</td><td colspan="3"></td></tr>
<tr><td colspan="5">Attach Reference Letter 4
Note: References to be in the letterhead of the company that is making the reference.</td></tr>
</table>

FAILURE TO PROVIDE RELEVANT PROOF WILL RESULT IN ZERO POINT ALLOCATION

8.2.3 STEP 2: FUNCTIONALITY TABLE

A tenderer shall proceed to the next stage of evaluation if a percentage score of 70% is obtained. Tenderers that fail to achieve the minimum qualifying percentage score for functionality (70%) will not proceed to the next stage of evaluation.

8.3 STAGE 2: PRICE AND SPECIFIC GOALS

Only tenders that achieve the minimum stipulated threshold for functionality of 70% will be evaluated further in accordance with the 80/20 or 90/10 preference point systems. The 80 or 90 points will be allocated for price whilst, 20 or 10 points will be allocated for specific goals level of contribution both totaling 100 points.

The formula below will be used in calculating points scored for the Preference points system

8.3.1 STEP 1: CALCULATION OF POINTS FOR PRICE

The first step under price is to calculate the price points for tenderers who progressed to this stage of evaluation as per formula below.

80/20 **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right) \qquad \text{or} \qquad Ps = 90\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Pmin

Where

Ps = Points scored for comparative price of tender under consideration.

Pt = Comparative price of tender under consideration.

Pmin = Comparative price of lowest acceptable tender.

Should the RFP proposal value be over R50M, 90/10 points scoring system will be used and for less than R50M 80/20 points scoring system will be used

8.3.2 STEP 2: SPECIFIC GOALS

The second step under price is to calculate specific goals level of contribution points for tenderers who progressed to this stage of evaluation as per below allocation.

SPECIFIC GOAL REQUIREMENT	EVIDENCE REQUIRED	POINTS ALLOCATED
B-BBEE Certificate/Sworn Affidavit	Original sworn affidavit/certified copy of the sworn affidavit or B-B-BBEE certificate (level 1 = 5, level 2 = 4, level 3 = 2, level 4,5,6,7 = 1, level 8 = 0)	5
Persons historically disadvantage of basis of Gender-Female owned	Affidavit confirming that the owner is =<35 years attached	5
Persons historically disadvantage of basis of Gender-Disability (Medical certificate attached)	Original/Certified Medical Certificate (certified not older than 6 months) with the following information: a) Name of practitioner, b) Practitioner number, c) Doctor's contact details, d) Details of the condition, e) Date, f) Signature, g) Stamp and h) Patient's name.	3
Development of youth	Certified ID copies of the directors, affidavit and share certificates	2
Locality (Ngaka Modiri Molema Municipality)	Proof of address (e.g. Municipal letter/lease agreement /traditional authority letter)	5
	TOTAL SPECIFIC GOAL POINTS	**20**

8.3.3 STEP 3: FINAL SCORE

The points scored for price (step 1) will be added together with the points scored for specific goals (step 2) to obtain the tenders total points.

Taletso TVET College and/ or Member/s may request additional information, clarification or verification in respect of any information contained in or omitted from a Tenderer's proposal. This information will be requested in writing;

Taletso TVET College and/ or Member/s will conduct a due diligence on any Tenderer, which will include interviewing customer references or other activities to verify a Tenderer's or other information and capabilities (including visiting the Tenderer's various premises and/or sites to verify certain stated information or assumptions) and in these instances the Tenderers will be obliged to provide Taletso TVET College and/ or Member/s with all necessary access, assistance and/or information which Taletso TVET College and/ or Member/s may reasonably request and to respond within the given time frame set by Taletso TVET College and/ or Member/s;

Taletso TVET College and/ or Member/s will evaluate the Tenders with reference to Taletso TVET College set and approved evaluation criteria as indicated in the tender document.

General Terms and Conditions of the Tender

9. ESCALATION MECHANISM

Escalation of prices, Taletso TVET College expects prices to remain fixed for the contract period

9.1 Any escalation in prices will be considered only under exceptional circumstances and upon a detailed breakdown of the various cost components and the percentage each cost component contributes to the total selling price.

9.2 Taletso TVET College reserves the right to accept price increases or to terminate the contract in part or in whole.

9.3 No price increase with retrospective effect shall be considered.

9.4 Any application for a price increase shall only become effective if approved by Taletso TVET College provided that a minimum period of 30 (thirty) days from date of application is required before any price increase may become effective.

10. PRICE OFFER AND ADJUSTMENTS

10.1 Prices quoted must be valid up to the conclusion and final award of the tender and thereafter remain fixed for the duration of the contract

10.2 Is the contract price firm for the duration of the contract period?

YES	NO

Please indicate the applicable block with ✓

10.3 If the reply to 10.2 is negative, on what grounds (with a breakdown of the various cost components and the percentage each cost component contributes to the total contract price) would price adjustments be requested?

Factors that contribute to any price escalation.

Cost Components	Weighting

10.4 Factors that contribute to any price escalation for imported goods/services.

a) Please state the Rate of Exchange at which your contracted price was based: ____

Please note: Should there be a price variance of more than 5% due to Rate of Exchange, then only will a price adjustment be considered.

b) Frequency of Escalation: ____

c) Any Statutory Related Price Adjustment________________________________

d) Price Formulas: ____

e) References to Indices: ____

f) Taletso TVET College reserves the right to audit evidence forwarded as motivation for price adjustments.

11. TENDER FORM, IMPORTANT CONDITIONS & MISCELLANEOUS REQUIREMENT

11.1 I/We hereby tender to supply all or any of the supplies and/or to render all or any of the services described in the attached documents to Taletso TVET College on the items and conditions and in accordance with the specifications stipulated in the tender documents (and which shall be taken as part of, and incorporated into, this tender) at the prices and on the terms regarding time for delivery and/or execution inserted therein.

11.2 I/We agree that:

a) The offer herein shall remain binding upon me/us and open for acceptance by Taletso TVET College during the validity period indicated and calculated from the closing time of the tender;

b) If I/we withdraw my/our tender within the period for which I/we have agreed that the tender should remain open for acceptance, or fail to fulfil the contract when called upon to do so, Taletso TVET College may without prejudice to its other rights, agree to the withdrawal of my/our tender or cancel the contract that may have been entered into between me/us and Taletso TVET College and I/we will then pay to Taletso TVET College any additional expense incurred by Taletso TVET College having either to accept any less favorable tender or fresh tenders have to be invited, the additional expenditure incurred by the invitation of fresh tender and by the subsequent acceptance of any less favorable tender, Taletso TVET College shall also have the right to recover such additional expenditure by set-off against moneys which may be due or become due to me/us under this or any other tender or contact or against any guarantee or deposit that have been furnished by me/us or on my/our behalf for the due fulfilment of this or any other tender or contract and pending the ascertainment of the amount of such additional expenditure to retain such moneys, guarantee or deposit as security for any loss Taletso TVET College may sustain by reason of my/our default;

c) If my /our tender is accepted, the acceptance may be communicated to me/us by letter or ordinary post or registered post and the SA Post Office Ltd shall be regarded as my/our agent. Delivery or such acceptance to the SA Post Office Ltd shall be treated as delivery to me/us;

d) The law of the Republic of South Africa shall govern the contract created by the acceptance of my/our tender and that I/we choose domicilium citandi et executandi in the Republic (full address).

e) I/We furthermore confirm that I/we have satisfied myself/ourselves as to the correctness and validity of my/our tender, that the price(s) and rate(s) quoted cover all the work/items(s) in these documents; and that the price(s) and rate(s) cover all my/our obligations under a resulting contract. I/we accept that any mistakes regarding price(s) and calculations will be at my/our risk.

f) I/we hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me/us under this agreement as the Principles (s) liable for the due fulfilment of this contract.

g) I/We agree that any action from this contract in all respects be instituted against me/us and I/we hereby undertake to satisfy fully any sentence or judgment, which may be pronounced against me/us as a result of such action.

h) I/We declare that I/we have participation /no participation in the submission of any other offer for the supplies/service described in the attached documents. If in the affirmative, state name(s) or tender(s) involved.

Are you duly authorized to sign Acknowledgement of the tender?

***YES / NO**

Has the Declaration of Interest been duly completed and signed?

*YES / NO

*Delete whichever is not applicable

SIGNATURE (S) OF TENDER OR ASSIGNEE(S) **DATE**:

Please complete the following in block letters

Capacity and particulars of the authority under which this tender is signed

....

Name of Service Provider ....

Postal Address ....

Telephone number(s) (Toll free if applicable) ....

Facsimile number(s) ....

Email Address(s) ....

Tender Number ....

Name of contact person ....

12. ACKNOWLEDGEMENT OF TENDER

12.1 I/We……………………………………………………………………having examined the Tender Document and all other information available prior to the closing date, hereby offer to execute, complete and maintain the whole of the said works and to supply all the requisite goods and/ or services in conformity with the previously mentioned documents.

12.2 Name of Service Provider: ____

Address: ____

____

____

____

____

Telephone Number: ____

Fax Number: ____

Email Address: ______________________________

Company Stamp: ______________________________

______________________________ ______________________________

Signature Date

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state[1], or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

   - the bidder is employed by the state; and/or

   - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative: ………………………………………………………….

2.2 Identity Number: ………………………………………………………………………………………………

2.3 Position occupied in the Company (director, trustee, shareholder[2]): …………………………………….

2.4 Company Registration Number: ………………………………………………………………………..…….

2.5 Tax Reference Number: …………………………………………………………………………………..………

2.6 VAT Registration Number: ……………………………………………………………………………….....

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

[1] "State" means –

(a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);

(b) any municipality or municipal entity;

(c) provincial legislature;

(d) national Assembly or the national Council of provinces; or

(e) Parliament.

[2]" Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member: ……....………………………………
Name of state institution at which you or the person connected to the bidder is employed : ………………………………………
Position occupied in the state institution: ………………………………………

Any other particulars:
………………………………………………………………

………………………………………………………………
………………………………………………………………

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

<u>(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.</u>

2.7.2.2 If no, furnish reasons for non-submission of such proof:

……………………………………………………………………….
……………………………………………………………………….
……………………………………………………………………….

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

…………………………………………………………………..

…………………………………………………………………..

…………………………………………………………………...

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

……………………………………………………………...

…………………………………………………………..….

………………………………………………………………

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars**.**

………………………………………………………………

………………………………………………………………

………………………………………………………………

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:

……………………………………………………………………………….

……………………………………………………………………………….

Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number / Persal Number

DECLARATION

I, THE UNDERSIGNED (NAME)……………………………………………………………………

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

………………………………….. ..…………………………………………

Signature Date

…………………………………. ………………………………………………

Position Name of bidder

SBD 6.1

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

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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).

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 80/20 preference point system.

b) The 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**

$$\boldsymbol{Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)} \text{ or } \boldsymbol{Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)}$$

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**

$$\boldsymbol{Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)} \text{ or } \boldsymbol{Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)}$$

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE Certificate/Sworn Affidavit	5	
Persons historically disadvantage of basis of Gender-Female owned	2	
Persons historically disadvantage of basis of Gender-Disability (Medical certificate attached)	5	
Development of youth	3	
Locality (Ngaka Modiri Molema Municipality)	5	
Total points	**20**	

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: …………………………………………………………

…………………………………………………………

………………………………………………………….

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1 This Standard Bidding Document must form part of all bids invited.

2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.

3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-

a. abused the institution's supply chain management system;
b. committed fraud or any other improper conduct in relation to such system; or
c. failed to perform on any previous contract.

4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the *audi alteram partem* rule was applied). **The Database of Restricted Suppliers now resides on the National Treasury's website(www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.**	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		

4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? **The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.**	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME) ………………………………………………… CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

…………………………………………...
Signature

…………………………..
Date

………………………………………….
Position

…………………………..
Name of Bidder

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Standard Bidding Document (SBD) must form part of all bids[1] invited.

2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging). [2] Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.

3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:

a. disregards the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.

b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.

4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

[1] Includes price quotations, advertised competitive bids, limited bids and proposals.

[2] Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

____

(Bid Number and Description)

in response to the invitation for the bid made by:

____

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: ____that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

   (a) has been requested to submit a bid in response to this bid invitation;
   (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
   (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. 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 consortium[3] will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
   - (a) prices;
   - (b) geographical area where product or service will be rendered (market allocation)
   - (c) methods, factors or formulas used to calculate prices;
   - (d) the intention or decision to submit or not to submit, a bid;
   - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
   - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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] 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.

10. 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.

………………………………………………… ……………………………………

Signature Date

…………………………………………………. ……………………………………

Position Name of Bidder

GENERAL CONDITIONS OF CONTRACT

PLEASE INITIAL EACH PAGE OF THE GENERAL CONDITIONS OF CONTRACT

Bidders shall provide full and accurate answers to all (including mandatory) questions posed in this document and are required to explicitly state "Comply/Accept" or "Do not comply/Do not accept" (with a or an X) regarding compliance with the requirements. Where necessary, the bidders shall substantiate their response to a specific question.

1.

This bid is subject to the General Conditions of Contract stipulated below.	**Accept**	**Do not accept**

2.

The laws of the Republic of South Africa shall govern this RFP and the bidders hereby accept that the courts of the Republic of South Africa shall have the jurisdiction.	**Accept**	**Do not accept**

3.

Taletso TVET College shall not be liable for any costs incurred by the bidder in the preparation of response to this RFP. The preparation of response shall be made without obligation to acquire any of the items included in any bidder's proposal or to select any proposal, or to discuss the reasons why such vendor's or any other proposal was accepted or rejected.	**Accept**	**Do not accept**

4.

Taletso TVET College may request written clarification or further information regarding any aspect of this proposal. The bidders must supply the requested information in writing within twenty-four **(24) hours** after the request has been made, otherwise the proposal may be disqualified.	**Accept**	**Do not accept**

5.

In the case of Consortium, Joint Venture or subcontractors, bidders are required to provide copies of signed agreements stipulating the work split and Rand value.	**Accept**	**Do not accept**

6

In the case of Consortium, Joint Venture or subcontractors, all bidders are required to provide mandatory documents as stipulated in schedule 1 of the Response format.	**Accept**	**Do not accept**

7

Taletso TVET College reserves the right to; cancel or reject any proposal and not to award the proposal to the lowest bidder or award parts of the proposal to different bidders, or not to award the proposal at all.	**Accept**	**Do not accept**

8

Where applicable, bidders who are distributors, resellers and installers of network equipment are required to submit back-to-back agreements and service level agreements with their principals.	**Accept**	**Do not accept**

9

By submitting a proposal in response to this RFP, the bidders accept the evaluation criteria as it stands.	**Accept**	**Do not accept**

10

Where applicable, Taletso TVET College reserves the right to run benchmarks on the requirements equipment during the evaluation and after the evaluation.	**Accept**	**Do not accept**

11

Taletso TVET College reserves the right to conduct a pre-award survey during the source selection process to evaluate contractors' capabilities to meet the requirements specified in the RFP and supporting documents.	**Accept**	**Do not accept**

12

Only the solution commercially available at the proposal closing date shall be considered. No Bids for future solutions shall be accepted.	**Accept**	**Do not accept**

13

The bidder should not qualify the proposal with own conditions. **Caution:** If the bidder does not specifically withdraw its own conditions of proposal when called upon to do so, the proposal response shall be declared invalid.	**Accept**	**Do not accept**

14

Should the bidder withdraw the proposal before the proposal validity period expires, Taletso TVET College reserves the right to recover any additional expense incurred by Taletso TVET College having to accept any less favourable proposal or the additional expenditure incurred by Taletso TVET College in the preparation of a new RFP and by the subsequent acceptance of any less favourable proposal.	**Accept**	**Do not accept**

15

Delivery of and acceptance of correspondence between the Taletso TVET College and the bidder sent by prepaid registered post (by air mail if appropriate) in a correctly addressed envelope to either party's postal address or address for service of legal documents shall be deemed to have been received and accepted after (2) two days from the date of postage to the South African Post Office Ltd.	**Accept**	**Do not accept**

16

Should the parties at any time before and/or after the award of the proposal and prior to, and-or after conclusion of the contract fail to agree on any significant product price or service price adjustments, change in technical specification, change in services, etc. Taletso TVET College shall be entitled within 14 (fourteen) days of such failure to agree, to recall the letter of award and cancel the proposal by giving the bidder not less than 90 (ninety) days written notice of such cancellation, in which event all fees on which the parties failed to agree increases or decreases shall, for the duration of such notice period, remain fixed on those fee/price applicable prior to the negotiations. Such cancellation shall mean that Taletso TVET College reserves the right to award the same proposal to next best bidders as it deems fit.	**Accept**	**Do not accept**

17

In the case of a consortium or JV, each of the authorised enterprise's members and/or partners of the different enterprises must co-sign this document.	**Accept**	**Do not accept**

18

Any amendment or change of any nature made to this RFP shall only be of force and effect if it is in writing, signed by Taletso TVET College signatory and added to this RFP as an addendum.	**Accept**	**Do not accept**

19

Failure or neglect by either party to (at any time) enforce any of the provisions of this proposal shall not, in any manner, be construed to be a waiver of any of that party's right in that regard and in terms of this proposal. Such failure or neglect shall not, in any manner, affect the continued, unaltered validity of this proposal, or prejudice the right of that party to institute subsequent action.	**Accept**	**Do not accept**

20

Bidders who make use of subcontractors. A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract	**Accept**	**Do not accept**

21

All services supplied in accordance with this proposal must be certified to all legal requirements as per the South African law.	**Accept**	**Do not accept**

22

No interest shall be payable on accounts due to the successful vendor in an event of a dispute arising on any stipulation in the contract.	**Accept**	**Do not accept**

23

Evaluation of Bids shall be performed by an evaluation panel established by Taletso TVET College. Bids shall be evaluated on the basis of conformance to the required specifications as outlined in the RFP. Points shall be allocated to each bidder, on the basis that the maximum number of points that may be scored for price is **80**, and the maximum number of preference points that may be claimed for B-BBEE (according to the PPPFA) is **20**.	**Accept**	**Do not accept**

24

If the successful bidder disregards contractual specifications, this action may result in the termination of the contract.	**Accept**	**Do not accept**

25

The bidders' response to this Bid, or parts of the response, shall be included as a whole or by reference in the final contract.	**Accept**	**Do not accept**

26

Should the evaluation of this bid not be completed within the validity period of the bid, Taletso TVET College has discretion to extend the validity period.	**Accept**	**Do not accept**

27

Upon receipt of the request to extend the validity period of the bid, the bidder must respond within the required time frames and in writing on whether or not he agrees to hold his original bid response valid under the same terms and conditions for a further period.	**Accept**	**Do not accept**

28

Should the bidder change any wording or phrase in this document, the bid shall be evaluated as though no change has been effected and the original wording or phrasing shall be used.	**Accept**	**Do not accept**

Signature Date

13. APPENDIX A PRICING SCHEDULE

Property Plant & Equipment

The successful service provider shall provide comprehensive insurance cover for all College Property, Plant and Equipment (PPE), including buildings, infrastructure, furniture, ICT equipment, machinery, specialised training equipment, electrical installations, laboratories, workshops, student residences, and all other movable and immovable assets.

The insurance shall, at a minimum, cover theft, burglary, accidental and malicious damage, fire, lightning, storm, flood, explosion, electrical and mechanical breakdown, power surges, transit risks, glass breakage, business interruption, and public liability. Cover shall be provided on a replacement value basis and include efficient claims management, timely claims settlement, asset valuation reviews, and regular claims reporting.

The appointed insurer shall also conduct annual infrastructure and asset compliance assessments to evaluate the insurability of the College's assets and ensure compliance with applicable legislation, building regulations, fire safety standards, Occupational Health and Safety (OHS) requirements, and insurer risk management standards.

The assessment shall identify risks and compliance deficiencies that may result in the repudiation of insurance claims and provide practical recommendations and corrective action plans to strengthen asset protection, minimise risk exposure, improve business continuity, and maximise the likelihood of successful claim settlements.

No	Category	Sum Insured (R)	1st Annual Insurance Premium (R) (To be filled by tenderer)
1	Land and buildings	185 513 464,00	
2	Plant and machinery	7 412 885,00	
3	Furniture and fixtures	5 394 921,00	
4	Motor vehicles	3 636 052,00	
5	IT equipment	13 630 160,00	
6	Work in progress capital projects	38 522 269,00	
	Total	**254 109 751,00**	

Student Group Personal Accident Insurance Cover

Provision of a comprehensive Student Group Personal Accident Insurance Policy for a maximum insured pool of 1,000 registered students per annum, with an aggregate annual cover of R2,000,000. The policy shall cover accidents occurring during authorised College activities, including academic activities, practical workshops, laboratories, classrooms, sporting activities, educational tours, work-integrated learning, official College travel, field trips, student leadership activities, and while on any College campus or participating in officially authorised College events.

The premium shall be inclusive of cover for accidental death, permanent disability, temporary disability, accidental dismemberment, accident-related medical expenses, emergency medical evacuation, rehabilitation, trauma counselling, funeral assistance, policy administration, claims management, annual reporting, student awareness programmes, and dedicated account management. Pricing shall be based on an annual insured pool of 1,000 students, with provision for review and adjustment of the insured pool at policy renewal where annual claims experience exceeds the insured population or where the College requires additional student cover

No	Category	Sum Insured (R)	1st Annual Premium (R) (To be filled by tenderer)
1	Accidental death	400 000,00	
2	Permanent and temporary disability	350 000,00	
3	Accident-related medical expenses	350 000,00	
5	Rehabilitation, trauma counselling	500 000,00	
6	Funeral assistance	400 000,00	
	Total	**2 000 000,00**	

Total Combined Cover

Bidders shall submit a comprehensive fixed price for **Year 1** by combining the premiums quoted for:

- **Property, Plant and Equipment Insurance Cover; and**
- **Student Group Personal Accident Insurance Cover.**

Bidders shall further provide separate pricing for **Year 2** and **Year 3**, taking into account any anticipated annual premium escalation, inflation, underwriting adjustments, or other applicable pricing factors. The pricing schedule shall clearly indicate the premium for each year and the total contract value for the full thirty-six (36) month period.

The annual escalation rate applied, together with the assumptions used in determining the Year 2 and Year 3 premiums, shall be clearly disclosed. The total tender price for evaluation purposes shall be the aggregate of the premiums for Years 1, 2, and 3 (36 months).

No	Category	Year 1 (R) (To be filled by tenderer)	Year 2 (R) (To be filled by tenderer)	Year 3 (R) (To be filled by tenderer)	Total (R) (To be filled by tenderer)
1	Property Plant & Equipment				
2	Student Group Personal Accident Insurance Cover				
	Total				