



REQUEST FOR QUOTATION FOR A LIFE ASSURANCE SERVICES PROVIDER FOR THE PROVISION OF DEATH AND FUNERAL COVER BENEFIT	
RFQ NUMBER:	REQ11049
RFQ ISSUE DATE:	10 August 2023
CLOSING DATE AND TIME:	22 August 2023 @ 11h00
RFQ VALIDITY PERIOD	30 Days (COMMENCING FROM RFQ CLOSING DATE)
DESCRIPTION OF SERVICES	REQUEST FOR QUOTATION FOR A LIFE ASSURANCE SERVICES PROVIDER FOR THE PROVISION OF DEATH AND FUNERAL COVER BENEFIT (Refer to Terms of reference from page 13)
SUBMISSION EMAIL ADDRESS	sibongile@nedlac.org.za and copy procurement@nedlac.org.za
PROCUREMENT ENQUIRIES	Name: Sibongile Pheeha Tel: 060 771 0835 Email: sibongile@nedlac.org.za
TECHNICAL ENQUIRIES	Name: Nthabiseng Koopedi Email: nthabiseng@nedlac.org.za

REQUEST FOR QUOTATION

BIDDER NAME:

COMPANY REGISTRATION NUMBER:.....

CSD NUMBER :.....

ADDRESS:
.....
.....

CONTACT PERSON :

TEL:

FAX:

E-Mail :

Mobile:

TOTAL RFQ PRICE R(VAT Incl.)

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

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.

PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT
SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

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 BBBEE	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:

$$80/20 \qquad \text{or} \qquad 90/10$$

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

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:

$$80/20 \qquad \text{or} \qquad 90/10$$

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

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 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 BBEE 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)
Level 1	10	20		
Level 2	8	16		
Level 3	5	10		
Level 4	4	8		
Level 5	3	6		
Level 6-8	0	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:

.....

.....

.....

TERMS OF REFERENCE FOR A LIFE ASSURANCE SERVICES PROVIDER FOR THE PROVISION OF DEATH AND FUNERAL COVER BENEFIT

1. PURPOSE

Nedlac requires the services of a life assurance service provider to provide it with a unapproved death cover with a continuation benefit and educator and a funeral cover for up to 50 members of Nedlac staff.

2. BACKGROUND

The National Economic Development and Labour Council (Nedlac) is a schedule 3A public entity that falls within the Department of Employment and Labour. Nedlac is the vehicle by which Government, labour, business and community organisations seek to cooperate, through problem-solving and negotiation, on economic, labour and development issues and related challenges facing the country.

Nedlac is managed by a secretariat, consisting of about 50 staff members and led by an Executive Director.

3. SCOPE OF WORK

Nedlac is seeking an assurance service provider for the following services:

Entity Name	NEDLAC
Member Categories	1
Normal Retirement Age	65
Industry	Government Entity
Area of operation	Rosebank, Gauteng
Number of Members	Up to 50 members

Benefit Structure	
Monthly Total Payroll (basic plus benefits)	R4 260 833
Unapproved Death (GLA)	3 times annual earnings
Continuation Option	Yes
Educator	Yes
Funeral Benefit	R30 000 family scale
Contract term	36 months

4. REQUIREMENTS OF THE BIDDER

- 4.1. The bidder must be a registered insurance service provider which has had previous experience of over five years in similar insurance covers.
- 4.2. The bidder must provide the following:
 - 4.2.1. A quotation indicating monthly premiums and annual premium escalation
 - 4.2.2. The curriculum vitae of the project/account manager/leader
 - 4.2.3. Proof of registration as an insurance service provider.
 - 4.2.4. Assign a dedicated accounts manager
 - 4.2.5. Short description of at least five previous completed similar assignments relating to labour law in the public sector, including:
 - Assignment name;
 - Brief description of assignment including nature of dispute or advise and resolution thereof if appropriate;
 - Signed reference letters from contactable references linked to these assignments

5. SUBMISSION OF DOCUMENTS

- 5.1 In addition to the requirements of 4.1. above, service providers **must** submit the following documents:
 - BBBEE certificate or sworn affidavit;
 - Completed SBD forms; and
 - Proof of registration on the Central Supplier Database.

6. SELECTION AND EVALUATION CRITERIA

6.1 Evaluation criteria

As this procurement is expected not to exceed a maximum of R50 million, the 80/20 preferential procurement measure is applicable. In order to achieve specific goals, a maximum of 20 points will be awarded to a tenderer for broad-based black economic empowerment as follows:

- B-BBEE status Level 1 contributor: 20 points
- B-BBEE status Level 2 contributor: 16 points
- B-BBEE status Level 3 contributor: 10 points
- B-BBEE status Level 4 contributor: 8 points
- B-BBEE status Level 5 contributor: 6 points
- B-BBEE status Level 6 - 8 contributor: 0 points

6.2 The RFQ will be evaluated in two phases as follows:

Phase 1 – Functionality Evaluation

<i>Functionality</i>	<i>100</i>
<i>Threshold</i>	<i>70</i>

Phase 2 – Pricing and Goal Evaluation

Price	80
Goal Evaluation	20

6.3 Functionality Evaluation criteria

The following evaluation criteria will be utilised:

5= Excellent, 4 = Good, 3 = Satisfactory, 2 = Poor, 1= Unacceptable

The below matrix will be used in scoring the submissions:

What is required	Application of evaluation criteria	% allocation
A. Relevant Expertise		
Ccompetency and expertise of bidder		
What is required	Application of evaluation criteria	% allocation
Insurance qualification at NQF Level 7 or higher that has been approved by IISA or to be verified by IISA.	5 = Excellent	40%
Leader and team members Insurance qualification at NQF Level 6 that has been approved by IISA or to be verified by IISA.	4 = Good	
Leaders and team members have Insurance qualification at NQF Level 5 that has been approved by IISA or to be verified by IISA.	3 = Satisfactory	
Leader and team members have Insurance qualification at NQF Level 4 that has been approved by IISA or to be verified by IISA.	2 = Poor	
Leader and team members have no Insurance qualification that has been approved by IISA or to be verified by IISA.	1 = Not Acceptable	
B. Relevant experience		
What is required	Application of evaluation criteria	% allocation
8 and above years or more relevant experience	5 = Excellent	40%
6 to 7 years' relevant experience	4 = Good	

4 to 5 years' relevant experience	3 = Satisfactory	
2 to 3 years' experience	2 = Poor	
0 to 1-year experience	1 = Not Acceptable	
C. Similar projects completed		
What is required	Application of evaluation criteria	% allocation
5 or more completed similar projects	5 = Excellent	20%
4 completed similar projects	4 = Good	
3 completed similar projects	3 = Satisfactory	
2 completed similar projects	2 = Poor	
1 completed similar projects	1 = Not Acceptable	

6.4 To note

6.4.1 The final decision and successful appointment will be made by Nedlac and no correspondence will be entered into thereafter.

6.4.2 Nedlac reserves the right to cancel this bid or ultimately decide not to appoint any service provider in terms of this call for quotations.

7. BID SUBMISSION AND ENQUIRIES

- 7.1. Bidders should send their completed quotations and accompanying relevant documentation to [procurement @nedlac.org.za](mailto:procurement@nedlac.org.za) by 22 August 2023 at 11AM.
- 7.2. Note that no late submissions will be considered.
- 7.3. Technical enquiries regarding this Terms of Reference should be emailed to nthabiseng@nedlac.org.za

- 7.4. Procurement enquiries regarding these terms of reference should be emailed to sibongile [@nedlac.org.za](mailto:sibongile@nedlac.org.za)