 <p><b>DURBAN ICC</b> INTERNATIONAL CONVENTION CENTRE INKOSI ALBERT LUTHULI ICC COMPLEX SOUTH AFRICA</p>	ISO Management System	Approval	
		Chief Financial Officer	
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**REQUEST FOR QUOTATION – OFFICE OF THE CFO – FIN 07/2024**

**TRAVEL INSURANCE COVER**

**1. Background**


The Durban ICC is one of the most advanced conferencing facilities in the world, having been voted Africa’s Leading Conference Centre by World Travel Awards for 18 years. The Centre is graded 5-star by the South African Tourism Grading Council.

It has also obtained certifications from the SABS (South African Bureau of Standards) in ISO 9001 (Quality Management), ISO 14001 (Environmental Management), ISO 22000 (Food Safety) and ISO 45001 (Occupational Health and Safety).

The Durban ICC requires the services of an experienced and competent insurance broker to provide travel insurance cover to the Durban ICC.

**2. Purpose**

The purpose of this Request for Quotation is to source an insurance broker who can capably facilitate and adequately assist with the insurance needs of the entity, specifically in relation to travel insurance cover.

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### 3. Mandatory Requirements

Does the service provider comply with the mandatory requirements? Please acknowledge as illustrated.	YES	NO
		<input type="checkbox"/>
The service provider must possess five (5) years of verifiable experience in dealing with various travel insurance cover claims, which were successfully expedited. This must be supported by a successful claims history.		
The service provider must have verifiable experience of having handled travel insurance cover to the value of at least R5m. Please submit evidence in confirmation of this requirement.		
The service provider must possess a license as an Authorised Financial Service Provider (FSP). This must be submitted together with the bid submission.		
The service provider must possess professional indemnity cover of not less than R1m.		
The service provider will be required to enter into a service level agreement with the Durban ICC, to be drafted by the Durban ICC. Any costs pertaining to the review of the service level agreement, must be for the service provider's account.		

**Please Note:** Failure to meet all of the stipulated mandatory requirements will result in the service provider being deemed non-responsive and will not be considered for stage two of the evaluation. The bidder must complete the final column above stating whether they can complete the task or not.

**NB:** Durban ICC agree that they will comply with Protection of Personal Information (POPI) Act regulations and process all the information and/or personal data in respect of the services being rendered in accordance with the said regulation and only for the purpose of providing the Services set out in the agreement to provide services.


### 4. Three Stage evaluation process

Stage 1: Bid submissions will be evaluated based on compliance with mandatory requirements, as detailed above

Stage 2: Functionality

The evaluation of the proposals will be based on how well the service provider demonstrates their development ability and how this is expressed in examples of previous work produced.

The service provider is required to submit a portfolio of evidence for evaluation in the various categories listed below. Bidders that do not obtain a minimum score of 70% on functionality criteria will be excluded from further evaluation.

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The service provider is required to submit a portfolio of its insurance portfolio, which must include reference to the following:

Description	Weighting
<b>Tenderer's Experience:</b> Relevant experience: To be verified through a portfolio of a proven track record of similar projects.	60
<b>Experience of Key Staff:</b> Do the key personnel have relevant and sufficient experience and expertise (5 years' relevant experience or more, indicated through a portfolio of a proven track record of similar projects)	40
<b>Total</b>	<b>100</b>

### Stage 3: Price and Preference

The procedure for the evaluation of responsive tenderer is **PRICE AND PREFERENCE** in accordance with the Employer's current SCM Policy, the Preferential Procurement Policy Framework Act (5 of 2000), and the Preferential Procurement Policy Framework Act Regulations (2022).


The **80/20** preference points system will be applied. The Formula used to calculate the **Price Points (max. 80)** will be according to that specified in Regulation 4.1.

### TENDERER'S EXPERIENCE

The experience of the tendering entity in projects of similar nature over the last five (5) years or more and rand value size of placements will be evaluated. Tenderers must demonstrate their understanding and knowledge of insurance brokerage and risk advisory services, as well as the size/level of experience in terms of rand value and placements in the local insurance market, in respect of travel insurance cover.

The scoring of the tenderer's experience for the size/level of placement in local insurance market placement, will be as follows:

Score	Prompts for Judgement
<b>(score 0)</b>	No response/ no documents submitted.
<b>Poor (score 40)</b>	The tenderer has limited experience in projects of similar nature. (Less than 4 projects.)
<b>Satisfactory (score 70)</b>	The tenderer has relevant experience in projects of similar nature. (4 projects.)
<b>Good (score 90)</b>	The tenderer has good experience in projects of similar nature.(5 projects)
<b>Very good (score 100)</b>	The tenderer has extensive experience in projects of similar nature.(More than 6 projects)

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The tenderer's experience to be disclosed should be structured in order to provide the following information:

Period of Years	Risk Type	Company/ Organisation	Public or Private Sector Client	Sum Insured	Contact & Person Telephone
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### EXPERIENCE OF KEY STAFF

The experience of assigned staff member in relation to the scope of work will be evaluated from three different points of view:

- 1) The number of key personnel and skills and experience of the assigned staff, in the specific operational areas - linked to the scope of work.
- 2) Number of years of insurance broking and risk advisory services including experience, level of education and training as well as previous exposure to cover types, for each operational key personnel.
- 3) The size of previous exposure of value at risk and availability of insurance risk survey services.


CVs of the key personnel, team leaders and other team members of each should be attached.

Each CV should be structured under the following headings:

Personal particulars	Qualifications	Skills.	Name of current & previous employer and position in enterprise.	Outline of recent assignments / experience that has a bearing on the scope of work. Rand values of placements experience per cover type.
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The scoring of the experience of key staff will be as follows (for each of the indicated (required) key staff):

Score	Prompts for Judgement
<b>(score 0)</b>	No response/ no documents submitted.
<b>Poor (score 40)</b>	Key staff have less than the minimum number of key personnel and levels of relevant qualification/training experience in handling travel insurance portfolio in the local insurance market. (Number of years of experience and qualifications are less than the minimum specified in the schedule below)
<b>Satisfactory (score 70)</b>	Key staff have reasonable levels of relevant qualification/training experience in handling travel insurance portfolio in the local insurance market. (Number of years of experience and qualifications are at least equal to the preferred specified in the schedule below)

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<b>Good (score 90)</b>	Key staff have extensive levels of relevant qualification/training experience in handling the travel insurance portfolio in the local insurance market. (Number of years of experience and qualifications are at least equal to the preferred specified in the schedule below)			
<b>Very Good (score 100)</b>	Key staff have outstanding levels of relevant qualification/training experience in handling the travel insurance portfolio in the local insurance market. (Number of years of experience and qualifications are at least equal to the preferred specified in the schedule below)			
<b>(Score 0)</b>	<b>Poor (score 40)</b>	<b>Satisfactory (score 70)</b>	<b>Good (score 90)</b>	<b>Very Good (score 100)</b>
No response	-1 key personnel. -5 years' experience. -passed key individual / regulatory insurance exams accredited by Financial Sector Conduct Authority in South Africa.	- 2 key personnel. -5 years' experience. -passed key individual / regulatory insurance exams accredited by Financial Sector Conduct Authority in South Africa.	- 3 key personnel. -5 years' experience. -passed key individual / regulatory insurance exams accredited by Financial Sector Conduct Authority in South Africa. - can do insurance risk survey services.	- 4 key personnel. -5 years' experience. -passed key individual / regulatory insurance exams accredited by Financial Sector Conduct Authority in South Africa. - can do insurance risk survey services.


The number of key personnel and the minimum five years of experience in corporate insurance broking and risk advisory services, insurance qualifications as well as insurance risk survey services are key functionality factors.

Key staff / personnel is a person who have five (5) years' experience or more in insurance broking and risk advisory services, serving corporate organisations/companies and has passed key individual or regulatory insurance exams as regulated, by Financial Sector Conduct Authority in South Africa

### **Preference Point System and Specific Goals**

**The definitions as per the SCM Policy are applicable.**

Preference Points (either 20 or 10) will be derived from points claimed on Returnable Document **MBD 6.1: "Preference Points Claim Form"** (in Section 4 of this procurement document) for the **Specific Goal(s)** as indicated on the table(s) below, and according to the specified **Goal Weightings**.

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**RDG Goal: The promotion of South African owned enterprises**

The tendering entity's **Address** (as stated on the National Treasury Central Supplier Database (CSD) or on the eThekweni Municipality Vendor Portal) is to be used in the determination of the tenderer's claim for **Preference Points** for this Specific Goal.

Goal Weighting 100%	
Location	80/20
Not in South Africa	0
South Africa	5
KZN	10
ETM	20

**Proof of claim as declared on MBD 6.1** (1 or more of the following will be used in verifying the tenderer's status)  
CSD report


**5. Pricing Schedule (Official Offer Form)**

Description	Unit of Measure	Estimated Quantity Required	Price (Excl. VAT)
Insurance Broking and Risk Advisory Services	Insurance Policy Schedules/Slips for travel insurance Cover	Insurance Broking and Risk Advisory Services Fees – Service Fee basis only	R
		VAT at 15%	R
		<b>Total cost (VAT incl.)</b>	R

**6. Preconditions**

A written proposal/quotation will not be considered unless the service provider who submits the quotation provides the following with their proposal/quotation:

- 6.1 Full name
- 6.2 Identification or company or other registration number
- 6.3 Tax reference number and VAT number, if any
- 6.4 Valid original Tax clearance pin from South African Revenue Services which proves that the service provider's tax matters are in order
- 6.5 Valid BBBEE Certificate
- 6.6 MBD 4 Declaration of Interest form must be completed
- 6.7 MBD 6.1 Preference points claim must be completed
- 6.8 The service provider must be registered on the CSD database and EThekweni Vendor Portal. Proof of registration needs to be submitted. Failure to be registered on these databases will

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adversely affect the awarding process and may result in the service provider being deemed non-responsive.

**CSD registration website:** <https://secure.csd.gov.za>

**EThekweni Vendor Portal registration:** <https://ethekwinivendor.durban.gov.za>

Or contact 031 322 7011 / 7154

[Fatima.milazi@durban.gov.za](mailto:Fatima.milazi@durban.gov.za) / [phumla.mdabe@durban.gov.za](mailto:phumla.mdabe@durban.gov.za)

## 7. Terms and Conditions

- 7.1 The service provider will hereby quote to perform and complete all work required in this RFQ within the quoted amount. It will be deemed that they have checked all aspects of this work before quoting and therefore the price tendered should be inclusive of all required work.
- 7.2 The Durban ICC is entitled to cancel the Request for Quotation (RFQ) at any time before the issue of the award. The Durban ICC shall, in no way, be liable for any damages whatsoever, including, without limitation, damages for loss of profit, in any way connected with the cancellation of this Request for Quotation (RFQ).

## 8. Protection of Personal Information


- 8.1 By responding to this Request for quotation you hereby consent to the Durban ICC processing your personal information as defined in the Protection of Personal Information Act 4 of 2013 ("POPIA").
- 8.2 The Durban ICC shall take reasonable steps in terms of POPIA to protect the personal information supplied as part of this Request for quotation.

## 9. Contact Person

Name: Bigboy Ngcobo  
Designation: Financial Manager  
Tel: 031 360 1304  
Email: bigboyn.co.za

## 10. Closing Date

Quotations/proposals, together with this document, marked for the attention of the Procurement Department and are to be placed in the Tender Box at the Durban ICC security entrance on the ground floor, 45 Bram Fischer Road Durban before **12:00 on 8<sup>th</sup> August 2024**.

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**11. Past experience in similar assignments**

Assignment Description	Key Elements	Date Completed	Contact Person and Telephone Number	Assignment Value


I.....being duly authorized thereto by..... do hereby confirm that the information contained herein is true and correct and acknowledge that, should it be established that any of the information contained herein is false and incorrect, my company may be disqualified from quoting to the Durban ICC.

**Name:** (*Block Capitals*) \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



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**12. Declaration of Municipals Fees**

I, the undersigned, do hereby declare that the Municipal fees of

.....  
(Full name of Company / Close Corporation / partnership / sole proprietary/Joint Venture)

(hereinafter referred to as the TENDERER) are, as at the date hereunder, fully paid or an Acknowledgement of Debt has been concluded with the Municipality to pay the said charges in instalments.

The following account details relate to property of the said TENDERER:


<u>Account</u>	<u>Account Number:</u> to be completed by tenderer.
Consolidated Account No.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Electricity	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Water	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Rates	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Other	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Other	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

I acknowledge that should the aforesaid Municipal charges fall into arrears, the Municipality may take such remedial action as is required, including termination of any contract, and any payments due to the service provider by the Municipality shall be first set off against such arrears.

- Where the TENDERER’S place of business or business interests are outside the jurisdiction of eThekweni Municipality, a copy of the accounts/agreements from the relevant municipality must be attached (to the back inside cover of this document).
- Where the tenderer’s Municipal Accounts are part of their lease agreement, then a copy of the agreement, or official letter to that effect is to be attached (to the back inside cover of this document).

NAME ..... (Block Capitals)  
SIGNATURE : ..... DATE: .....

*(of person authorised to sign on behalf of the Tenderer)*

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### 13. MBD4 Declaration of Interest

13.1 No bid will be accepted from persons in the service of the state<sup>1</sup>.

13.2 Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

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

13.3.1 Full name of bidder or his/her representative .....

13.3.2 Identity number: .....

13.3.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>):

.....

13.4.4 Company Registration Number: .....

13.4.5 Tax Reference Number: .....

13.4.6 VAT Registration Number: .....

13.4.7 The names of all directors / trustees / shareholder's members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

#### References:

<sup>1</sup> MSCM Regulations: "in the service of the state" means to be –

(a) a member of –

- any municipal council
- any provincial legislature
- the National Assembly or the National Council of Provinces

(b) a member of the board of directors of any municipal entity;


(c) an official of any municipality or municipal entity;

(d) an employee of 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);

(e) a member of the accounting authority of any national or provincial public entity;

(f) an employee of parliament or a provincial legislature.

<sup>2</sup> "Shareholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

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13.4.8 Are you presently in the service of the state?  
If yes, furnish particulars:

YES	NO
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13.4.9 Have you been in the service of the state for the past twelve months? If yes, furnish particulars:

YES	NO
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13.4.10 Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and/or adjudication of this bid?  
If yes, furnish particulars:

YES	NO
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13.4.11 Are you aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and/or adjudication of this bid?  
If yes, furnish particulars:

YES	NO
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13.4.12 Are any of the company's directors, trustees, managers, principal shareholders or stakeholders in service of the state?  
If yes, furnish particulars:

YES	NO
-----	----

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13.4.13 Is any spouse, child or parent of the company's directors, trustees, managers, principal shareholders or stakeholders in service of the state? If yes, furnish particulars:

YES	NO
-----	----

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13.3.14 Do you or any of the directors, trustees, managers, principal shareholders or stakeholders of this company have any interest in any other company or business whether or not they are bidding for this contract? If yes, furnish particulars:

YES	NO
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**14. Full details of directors / trustees / members / shareholders**


Full Name	Identity Number	State Employee No.

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Capacity**

\_\_\_\_\_  
**Name of Bidder**

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## **15. MBD 6.1: PREFERENCE POINTS CLAIM**

### **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, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

#### **1.0 GENERAL CONDITIONS**

1.1 The following preference point system is 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 **The 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the applicable system once tenders are received.

1.3 Preference Points for this tender shall be awarded for:

- **Price and Specific Goals:** 80 (price) and 20 (specific goals), in terms of 1.2 above.
- The total Preference Points, for Price and Specific Goals, is 100.

1.4 Failure on the part of the bidder to submit the required proof or documentation, in terms of the requirements in the (Special) Conditions of Tender for claiming **Specific Goal** preference points, will be interpreted that preference points for **Specific Goals** are not claimed.


1.5 The Durban ICC reserves the right to require of a bidder, either before evaluation or at any time subsequently, to substantiate any claim in regard of preferences, in any manner required by the entity.

#### **2.0 DEFINITIONS**

2.3 “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes.

2.4 “**tender for income-generating contracts**” means a written offer in the form determined by Municipality 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 Municipality and a third party that produces revenue for the Municipality, 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.

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

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### 3.0 FORMULA FOR CALCULATION OF PREFERENCE PRICE POINTS

#### 3.1 PROCUREMENT OF GOODS AND SERVICES

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


<b><u>80 / 20 Points System</u></b>	OR	<b><u>90 / 10 Points System</u></b>
$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$		$P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$

Where:

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

#### 4.0 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 request for tender. For the purposes of this tender the tenderer will be allocated points based on the **points claimed** for the goal(s) stated in **Table 1** below, as supported by proof submitted.
- 4.2 In cases where the municipality intends 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, the municipality 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 municipality must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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**TABLE 1:** Specific Goals for the tender and maximum points for each goal are indicated per the table below.

**Tenderers are to indicate their points claim for each of the Specific Goals in the shaded blocks.**

The Specific Goals to be allocated points in terms of this tender	Maximum Number of points ALLOCATED (80/20 system)	Maximum Number of points ALLOCATED (90/10 system)	Number of points CLAIMED (80/20 system)	Number of points CLAIMED (90/10 system)
RDP Goal: The promotion of South African owned enterprises.	20	n/a		n/a
<b>Total CLAIMED Points (20 Maximum)</b>				n/a

I, the undersigned, who warrants that they are authorised to sign on behalf of the Tenderer, certify that the points claimed, based on the specific goals as specified in the tender, qualifies the tendering entity for the preference(s) shown.

I acknowledge that:

- 1) The information furnished is true and correct.
- 2) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- 3) 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.
- 4) 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.

**NAME (Block Capitals):**

**Date**

**SIGNATURE:**