



THEMBELIHLE

*Incorporating the towns of Strydenburg and Hopetown
Northern Cape Province, Republic of South Africa*

LOCAL MUNICIPALITY
PLAASLIKE MUNISIPALITEIT
U-MASIPALA WASEKUHLENI

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INVITATION TO BID

TENDER NUMBER: TLM 02/2025/26: PROVISION OF INTERMEDIARY SERVICES FOR THE SHORT TERM INSURANCE AND RISK MANAGEMENT FOR A PERIOD OF 3 YEARS

CLOSING DATE: 12 AUGUST 2025 AT 12h00

Proposals are hereby requested from Prospective Service Providers for the Provision of Intermediary Services for Short-Term Insurance and Risk Management to Thembelihle Local Municipality for a period of three (3) years.

Proposals must be submitted on the original documents and remain valid for ninety (90) days after the closing date of the bid.

A set of tender documents will be available from **Thursday, 31st of July 2025** at the Municipal Offices at Church Street, Hopetown, and can be obtained at a non-refundable amount of **R500.00** per set.

Deposits can be made by Cash at the cashiers in Hopetown or by EFT to the following municipal bank account and submit proof of payment via email to manbto@tlm.gov.za using the tender Number in the subject line.

Account Holder	Thembelihle Local Municipality
Account Number	041 879 171
Bank	Standard Bank
Branch	Kimberley
Branch nr	050002
Reference	TLM02_name of service provider (e.g TLM02_Thembelihle)

Enquiries pertaining to the specifications/bid information can be addressed to Mrs N Jaxa by forwarding an email to manbto@tlm.gov.za with a Tender Number on the subject line.

Fully completed documents must be placed in a sealed envelope and placed in the tender box in the Foyer at the Thembelihle Local Municipal offices or mailed to reach the tender box at corner of Mark and Church Streets, Hopetown, not later than the time and date stipulated or be mailed to reach the Tender Box, before the specified closing date and time. The envelopes must be endorsed clearly with the number, title, bidder's name and closing date and time of the tender as above.

The tender box will be emptied just after 12:00 on the closing date as above, thereafter all bids will be opened in public.

Failure to submit the below-mentioned compulsory documents will lead to immediate disqualification of your bid

- ï Copy/ printed Tax compliance status Pin to enable the municipality to verify the bidder's tax compliance status- Compulsory
- ï Copy of company's current municipal account and all its directors (not older than 3 months) or copy of Lease Agreement (and Landlord's municipal account) – Compulsory
- ï CSD summary report – Compulsory
- ï Proof of Professional Indemnity cover Minimum R20 million – Compulsory
- ï Proof of Registration with Financial Sector Conduct Authority (FSCA) – Compulsory
- ï Proof of Registration with the Institute of Risk Management – South Africa (IRMSA) – Compulsory
- ï Proof of Registration with Financial Intermediaries Association (FIA) - Compulsory
- ï Confirmation Letters of CSI Projects in different provinces minimum of 3 letters – Compulsory

The tenders will be evaluated on a 2-Stage Process:

Stage 1: Functionality

The following Evaluation criteria will be applied.

Evaluation of Bidders Ability to execute the project in terms SCM regulation 28 (1)(b). Failure to meet the below mentioned will lead to disqualification of your bid

Criteria	Maximum Points	Scores
<p>Relevant Track Record on the provision of short-term insurance. <i>(Appointment Letters and reference letters on the relevant letterhead and signed by a delegated official from the client served for similar service)</i></p> <p>1. >10 Letters 25 Points</p> <p>2. 5-9 Letters 10 Points</p> <p>3. 1-4 Letters 5 Points</p> <p>4. Three and Less (3-0 Letters) 0 Points</p> <p><i>All the appointment letters should be referenced by formal reference letter in a client letterhead and signed by a delegated official</i></p>	25	
<p>Qualifications, Professional Affiliation and Experience with respect to printing services.</p> <p>i. <i>Director of the company (CIPC registered) should have a minimum of 5 years relevant experience and be in position of the regulation exam certificate for the following periods: -</i></p>	35	

<ul style="list-style-type: none"> ➤ > 10 years 10 points ➤ 6 – 9 years 05 points ➤ Above 5 years 02 points 		
<p>ii. Executive Assistance 10 points <i>Minimum five (05) years' experience, submit a CV that presents the related experience in short term insurance related to Municipal assets (experience to correspond with the attached appointment letters) with relevant qualifications in the insurance field and the person should have a regulation exam certificate or certificate of proficiency.</i></p>		
<p>iii. Manager client services 10 points <i>Minimum five (05) years' experience, submit a CV that presents the related experience in short term insurance related to Municipal assets (experience to correspond with the attached appointment letters) with relevant qualifications in the insurance field and the person should have a regulation exam certificate or certificate of proficiency.</i></p>		
<p>iv. Clients Clerk 05 points <i>Minimum three (03) years' experience, submit a CV that presents the related experience in short term insurance related to Municipal assets (experience to correspond with the attached appointment letters) with relevant qualifications in the insurance field.</i></p> <p><i>NB!! Bidders to provide an organogram reflecting the positions as stated above and the position holders.</i></p>		
<p>Methodology and Approach</p> <p>A clearly defined Proposal including:</p> <ul style="list-style-type: none"> ➤ Detailed Project plan with clear timelines ➤ Detailed process Plan on how the account will be managed i.e., processing of claims, queries, etc. ➤ The quality of the criteria to provide cover to be used i.e., what will be regarded as a valid claim to maximum risk? ➤ Provide a detailed methodology including how the Service Provider will conduct services between the Client, Broker, and Insured Party <p><i>The methodology and workplan should include all the above-mentioned aspects and be in detail.</i></p>	15	
<p>Proof of accredited professional insurance association or affiliation of the service provider</p> <ul style="list-style-type: none"> ➤ FSB License in insurance, ➤ Professional indemnity cover, <ul style="list-style-type: none"> ✓ >R 20 million, 25 points ✓ R 10 million – R 19 million, 10 points ✓ R 3 million – R 9 million 05 points 	25	
Total Score	100	

NB: A bidder that scores less than **80** points out of **100** points in respect of functionality will be regarded as submitting a non-responsive bid and will not further be evaluated.

Stage 2: 80/20 Preference Points system as prescribed by the Revised Preferential Procurement Policy Framework of 2022.

The following Specific Goal(s) will apply:

Specific Goal	Weight
BBBEE	6
People with Disability	4
Youth	4
Women	4
Implementing reconstruction and development programme	2

Only Bidders found responsive in Stage 1 will be further evaluated in Stage 2.

The Municipality reserves the right to withdraw any invitation to tender and/or to re-advertise or to reject any tender or to accept a part of it. The Municipality does not bind itself to accepting the lowest tender or award a contract to the bidder scoring the highest number of points.

MS. KG GABORONE
MUNICIPAL MANAGER